IRAQ DEVELOPMENT MANAGEMENT SYSTEM (IDMS)

ANALYTICS

USER MANUAL

Version 3.1

SYNERGY INTERNATIONAL SYSTEMS

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TABLE OF CONTENTS

1. INTRODUCTION 6

2. OVERVIEW 6

3. WHO USES IDMS? 8

4. LOGGING INTO THE IDMS APPLICATION 9

4.1 Registering for a Username and Password 10
4.2 Accessing IDMS without Registration 11

5. IDMS ANALYTICS STRUCTURE 12

6. MY WORKSPACE MODULE 14

6.1 External Assistance Projects in My Workspace Module 15
6.1.1 Adding an External Assistance Project 16
6.1.2 Viewing External Assistance Project Details 16
6.2 Capital Investment Projects in My Workspace Module 16
6.2.1 Managing Announcements 18
6.2.2 Financial Years Setup 19
6.2.3 My Draft Funding Requests 20
6.2.4 Submitted Funding Requests 24
6.2.5 Approved Projects 26
6.2.6 Adjust Budget Ceilings 28
6.2.7 Adjust Project Funding Requests 31
6.2.8 Regular Funding Request Approval Procedure 33
6.2.9 Emergency Funding Request Approval Procedure 35
6.2.10 Adding a Capital Investment Project Request 37
6.2.11 Viewing Capital Investment Project Details 37
6.2.12 Search in Capital Investment Projects of My Workspace 37
6.2.12.1 Quick Search 38
6.2.12.2 Advanced Search 38
6.3 NDP Indicators in My Workspace Module 39
6.3.1 Adding a New Indicator 40
6.3.2 Viewing Indicator Details 41
6.3.3 Search in NDP Indicators of My Workspace 41

7. LIST MODULE 43

7.1 Accessing the List Module 43
7.2 Expanding the List Item 44
7.3 Sorting List Items 44
7.4 Browsing among List Items 44
7.5 Refining the Report 45
7.6 Hiding / Showing Images in the List 46
7.7 Modifying the Current View 47
7.7.1 Adding List Groups / Columns / Column Groupings 48
7.7.2 Re-ordering Groups / Columns / Column Groupings 48
7.7.3 Removing Groups / Columns / Column Groupings 48

7.7.4 Setting a View as Default 48
7.8 Sample Views 49
7.8.1 Sample View 1 49
7.8.2 Sample View 2 50

8. CHART MODULE 52

8.1 Key Features 52
8.2 Accessing the Chart Module 52
8.3 Main Screen and Its Components 53
8.4 View Screen and Its Components 57
8.5 Sample Chart Reports 58
8.5.1 Sample Chart Report 1 58
8.5.2 Sample Chart Report 2 59

9. MAP MODULE 61

9.1 Key Features of the GIS Tool 61
9.2 Accessing the Map Module 63
9.3 Map Module Screen Components 63
9.4 Working in the Map Module 64
9.4.1 Zooming in / Zooming out 64
9.4.2 Measuring Distance 65
9.4.3 Buffered Zone Querying 66
9.4.4 Using Layers 66
9.4.5 Viewing Legend 68
9.4.6 Using Mini Map 69
9.4.7 Viewing the Data Displayed on the Map 70
9.5 Sample Map Reports 71
9.5.1 Sample Map Report 1 71
9.5.2 Sample Map Report 2 72

10. REPORT MODULE 74

10.1 Accessing the Report Module 74
10.2 Creating a Report 74
10.3 Previewing a Report 77
10.4 Generating a Report 78
10.5 Sample Reports 79
10.5.1 Sample Report 1 79
10.5.2 Sample Report 2 80
10.6 Customizing Reports 82
10.6.1 Formatting/Styling Report Components 82
10.6.2 Re-ordering Report Table Components 85
10.6.3 Defining the Data Display Type 86
10.6.4 Sorting Report Table Components 86
10.6.5 Removing a Report Table Component 87
10.6.6 Switching Report Table Components 87
10.6.7 Building Complex Expressions 88
10.7 Sample Report Formatting 89

11. DASHBOARD MODULE 92

11.1 KEY FEATURES 92
11.2 ACCESSING THE DASHBOARD MODULE 92
11.3 MAIN SCREEN AND ITS COMPONENTS 93
11.4 DASHBOARD MANAGEMENT 94
11.4.1 Create a New Dashboard 94
11.4.2 Add an Item to a Dashboard 95
11.4.3 Customize a Dashboard 96
11.4.4 Save a Dashboard 97
11.4.5 Delete a Dashboard 97
11.4.6 Discard the Changes 98
11.4.7 Update Data 98

12. DETAILS SECTION 99

12.1 ACCESSING THE DETAILS SECTION 99
12.2 BROWSING AMONG PROJECTS 101
12.3 PRINTING THE PROJECT DETAILS 101
12.4 EDITING AN EXISTING PROJECT 101

13. CUSTOMIZED REPORTING 102

13.1 SETTING REPORT OPTIONS 102
13.2 SAVING REPORTS 102
13.2.1 How to Save New Reports 103
13.2.2 How to Save a Copy of the Report 103
13.3 RE-ORGANISING REPORTS 104
13.3.1 Renaming Reports and Report Groups 104
13.3.2 Deleting Reports or Report Groups 105
13.3.3 Adding a Sub-group 105
13.3.4 Re-ordering Reports and Groups 105
13.3.5 Setting a Report as Default 105
13.3.6 Setting a Report as Default for Public Users 105
13.4 VIEWING PRE-DEFINED REPORTS 106
13.5 EDITING PRE-DEFINED REPORTS 106
13.6 EXPORTING REPORTS 106
13.7 PRINTING REPORTS 107

14. FILTERING 108

14.1 CREATING FILTERING CRITERIA 108
14.2 SAMPLE FILTERING CRITERIA 110

15. SEARCH 113

15.1 SIMPLE SEARCH 113
15.2 ADVANCED SEARCH 113
15.3 SAMPLE SEARCH CRITERIA 114

16. LOGGING OUT 116

17. REFERENCES 116

TABLE OF FIGURES

FIGURE 1: IDMS APPLICATION LOGIN SCREEN 9
FIGURE 2: USER REGISTRATION FORM 10
FIGURE 3: MY PROFILE SECTION 11
FIGURE 4: IDMS ANALYTICS STRUCTURE 12
FIGURE 5: MY WORKSPACE SECTION 14
FIGURE 6: EXTERNAL ASSISTANCE PROJECTS SECTION IN MY WORKSPACE 15
FIGURE 7: CAPITAL INVESTMENT PROJECTS SECTION IN MY WORKSPACE 17
FIGURE 8: ANNOUNCEMENTS AREA IN THE CAPITAL INVESTMENT PROJECTS SECTION 18
FIGURE 9: FINANCIAL YEARS SETUP LINK IN THE CAPITAL INVESTMENT PROJECTS SECTION 18
FIGURE 10: ADD ANNOUNCEMENTS BUTTON IN CAPITAL INVESTMENT PROJECTS SECTION 19
FIGURE 11: EDITING ANNOUNCEMENTS AREA IN CAPITAL INVESTMENT PROJECTS SECTION 19
FIGURE 12: FINANCIAL YEARS SETUP WINDOW IN MY WORKSPACE 20
FIGURE 13: CALENDAR 20
FIGURE 14: FUNCTIONS AND SUMMARY IN DRAFT LIST OF CAPITAL INVESTMENT PROJECTS SECTION 22
FIGURE 15: CREATE ONGOING FUNDING REQUEST WINDOW 23
FIGURE 16: FUNCTIONS AND SUMMARY IN SUBMITTED LIST OF CAPITAL INVESTMENT PROJECTS SECTION 26
FIGURE 17: SUMMARY IN APPROVED LIST OF CAPITAL INVESTMENT PROJECTS SECTION 27
FIGURE 18: ADJUST BUDGET CEILINGS FORM – PART 1 29
FIGURE 19: ADJUST BUDGET CEILINGS FORM – PART 2 30
FIGURE 20: ADJUST FUNDING REQUESTS/ALLOCATIONS FORM 32
FIGURE 21: REGULAR FUNDING REQUEST APPROVAL PROCEDURE 33
FIGURE 22: EMERGENCY FUNDING REQUEST APPROVAL PROCEDURE 35
FIGURE 23: ADVANCED AND QUICK SEARCH OPTIONS IN CAPITAL INVESTMENT PROJECTS SECTION 38
FIGURE 24: NDP INDICATORS SECTION IN MY WORKSPACE 40
FIGURE 25: CREATE NEW INDICATOR BUTTON IN NDP INDICATORS SECTION 41
FIGURE 26: ADVANCED SEARCH IN NDP INDICATORS SECTION 42
FIGURE 27: IDMS APPLICATION LIST MODULE 43
FIGURE 28: EXPANDING THE LIST ITEM LEVEL 44
FIGURE 29: REFINE REPORT AREA 45
FIGURE 30: REFINING A REPORT 46
FIGURE 31: SHOWING IMAGES IN THE LIST 47
FIGURE 32: MODIFYING THE CURRENT VIEW 48
FIGURE 33: DEFINING LIST VIEW GROUPINGS FOR SAMPLE VIEW 1 49
FIGURE 34: DEFINING LIST VIEW COLUMNS FOR SAMPLE VIEW 1 49
FIGURE 35: SAMPLE VIEW 1 50
FIGURE 36: DEFINING LIST VIEW GROUPINGS FOR SAMPLE VIEW 2 50
FIGURE 37: DEFINING LIST VIEW COLUMNS FOR SAMPLE VIEW 2 51
FIGURE 38: SAMPLE VIEW 2 51
FIGURE 39: MAIN SCREEN OF THE CHART MODULE 53
FIGURE 40: VIEW SCREEN OF THE CHART MODULE 57
FIGURE 41: SAMPLE CHART REPORT 1 59
FIGURE 42: SAMPLE CHART REPORT 2 60
FIGURE 43: MAP MODULE 61
FIGURE 44: INTELLIGENT SEARCHING 64
FIGURE 45: MEASURING DISTANCE 65

FIGURE 46: BUFFERED ZONE QUERYING 66
FIGURE 47: SELECTING CHART TYPE 68
FIGURE 48: VIEWING CHART LEGEND 69
FIGURE 49: USING MINI MAP 70
FIGURE 50: VIEWING THE DATA DISPLAYED ON THE MAP 71
FIGURE 51: SAMPLE MAP REPORT 1 72
FIGURE 52: SAMPLE MAP REPORT 2 73
FIGURE 53: IDMS APPLICATION REPORT MODULE 74
FIGURE 54: SELECTING A GROUPING FOR A REPORT 76
FIGURE 55: COMPATIBILITY MATRIX 77
FIGURE 56: PREVIEWING THE REPORT 78
FIGURE 57: CREATING REPORT 1 79
FIGURE 58: SAMPLE LIST REPORT 1 80
FIGURE 59: CREATING REPORT 2 81
FIGURE 60: SAMPLE LIST REPORT 2 81
FIGURE 61: REPORTS WINDOW WITH PROPERTIES FOCUS ON THE TITLE FIELD 82
FIGURE 62: FORMATTING/STYLING TEXT ENTRIES 83
FIGURE 63: REPORTS WINDOW WITH PROPERTIES FOCUS ON THE COLUMN 84
FIGURE 64: ASSIGNING PROPERTIES TO REPORT TABLE COMPONENTS 85
FIGURE 65: REORDERING REPORT TABLE COMPONENTS 85
FIGURE 66: DEFINING THE DATA DISPLAY TYPE 86
FIGURE 67: DEFINING THE SORTING ORDER 87
FIGURE 68: SWITCHING REPORT TABLE COMPONENTS 87
FIGURE 69: EXPRESSIONS SECTION IN THE REPORT MODULE 88
FIGURE 70: ADDING AN EXPRESSION 89
FIGURE 71: CREATING AND FORMATTING A REPORT 90
FIGURE 72: SAMPLE FORMATTED REPORT 91
FIGURE 73: DASHBOARD MODULE 93
FIGURE 74: ADDING A NEW DASHBOARD 94
FIGURE 75: LIST OF PRE-DEFINED REPORTS 95
FIGURE 76: ADDING A NEW REPORT 96
FIGURE 77: CUSTOMIZING A DASHBOARD 97
FIGURE 78: DETAILS SECTION 100
FIGURE 79: SETTING THE REPORT OPTIONS 102
FIGURE 80: MEMORIZING A REPORT 103
FIGURE 81: ORGANISING THE REPORTS 104
FIGURE 82: FILTERS 108
FIGURE 83: SEARCHING FOR A CATEGORY ITEM 109
FIGURE 84: CREATING FILTERING CRITERIA 110
FIGURE 85: INITIAL VIEW 111
FIGURE 86: SAMPLE FILTERING CRITERIA 111
FIGURE 87: FILTERED LIST 112
FIGURE 88: CREATING A SEARCH CRITERIA 113
FIGURE 89: DEFINING SEARCH CRITERIA 114
FIGURE 90: SEARCH RESULTS 115

1. INTRODUCTION

The purpose of this document is to describe how the *Iraq Development Management System (IDMS)* application functions and to provide the necessary instructions to ensure successful work with the application. Use of this document and compliance with the standards specified herein is mandatory for anyone working with the mentioned application.

2. OVERVIEW

The *Iraq Development Management System (IDMS)* is an automated information management system which is designed to improve efficiency and coordination of donor activities in Iraq. It is also a powerful tool for tracking and analyzing aid flows. The system serves as the main database and data collection and reporting system as it ensures effective access to the aid data.

The main objective of *IDMS* is to serve as a reliable and credible source of information on overall donor contributions to Iraq's reconstruction, economic recovery and socio-economic development, as well as to support the Government in effectively managing development assistance and promoting the accountable and transparent use of resources.

IDMS is a powerful tool to view project data organised into lists, reports, charts, and maps, present the project data in the form of different analytical reports in the *List*, *Chart*, *Map* and *Report* modules, memorize/save the reports, print them, and export them into PDF, MS Word and MS Excel format files.

IDMS is designed to provide quick access to the project and aid data remotely via Internet. Once you have accessed the application, you can view the project data stored in the database, add new projects, edit existing ones, etc.

In the current design, *IDMS* consists of the following applications:

- **External Assistance Projects** – this application is designed to track the ongoing projects that are financed from external sources, e.g. donor community, International NGOs, etc. Once you have accessed this application, you are able to view project details, track aid flows to the country, and create analytical reports in the List, Chart, Map and Report modules. Moreover, in this application you can add new projects or modify the information of existing projects through the built-in on-line *Data Entry* module.

- **Donor Profile -** this application is designed to track the donor profile information. Moreover, it gives the donor organisations / entities the possibility to provide information about the amount of assistance provided to the country, etc. This is done in the built-in on-line *Data Entry* module. Also, you can create analytical reports in the List, Chart, and Report modules.

- **Capital Investment Projects -** this application is designed to track the public investment projects that have been approved for the implementation and the projects that are currently being implemented. These projects comprise the Public Investment Portfolio

and are financed out of the national budget. Once you have accessed this application, you are able to view project details and create analytical reports in the List, Chart, Map and Report modules. Moreover, in this application you can add new projects or modify the information of existing projects, which is done in the built-in on-line *Data Entry* module.

- **Iraq Development Projects** - this application is designed to consolidate the data from the two applications: *External Assistance Projects and Capital Investment Projects.*

- **NDP Indicators** - this application is designed to track project indicators and the related progress.

The examples described in the sections below are based on the *External Assistance Projects* application.

IDMS provides a web-based user interface and requires a web browser (Internet Explorer) pre-installed.

Note: To ensure more flexibility and a more user-friendly environment, *IDMS* has been implemented as a bilingual system allowing the data to be presented in the system in two languages: English and Arabic.

3. WHO USES IDMS?

The table below lists the groups of users that might be accessing and managing the *IDMS* application:

Users Group	Who are they?	Why they need IDMS access?
Administrators	IDMS system administrator	Access to the entire data stored in *IDMS*.
Executing Body (ExB)	Ministry or Governorate users	Responsible for creating a new project request with all the required data and saving it as a draft.
Assigned MoP Sectoral Unit (MSU)	Ministry of Planning's Sectoral Unit users	Responsible for revising the draft project requests, making necessary changes and applying the draft for a submission. This user also negotiates with the Line Ministry before sending the draft forward to the MIU.
MoP Investment Unit (MIU)	Ministry of Planning's Investment Unit users	Responsible for sending the revised draft project request for an approval first to the Council of Ministers and then to the country Parliament.

For each user group, a specific role is assigned by the IDMS system administrator, in accordance to the requirements. Depending on the role, users get certain permissions to add, edit or modify and view entries in the *IDMS* application.

Note: If you do not have enough permission to perform certain actions, please refer to your project coordinator or system administrator.

Besides the group listed above, customized groups may also be created on demand.

4. LOGGING INTO THE IDMS APPLICATION

The starting screen of *IDMS* is the *Login Screen*. The application requires entering a valid username and password and then submitting them. The section below provides for the necessary instructions on logging into the *IDMS* application.

In order to log into the application, follow the steps described below:

1. Provide the username and password in the appropriate fields in the *Login Screen* (Figure 1).
2. Click the **LOGIN** button.

Note: The password is case sensitive.

Note: If you have failed to log in several times, the system will be blocked. Contact your system administrator in order to unlock your user access. The number of unsuccessful login attempts is configured from the Administration Center (see *IDMS Administration Center User Manual* in REFERENCES).

عربي
idmshelpdesk@mop.gov.iq | help | F.A.Q.
IRAQ DEVELOPMENT MANAGEMENT SYSTEM
The Iraq Development Management System (IDMS) is a comprehensive web-based application that manages the whole cycle of government and donor-funded development projects in Iraq, inclusive of social and economic as well environmental projects. The IDMS will also serve as a reliable, credible, and ultimately invaluable source of information on the distribution of development projects according to sectors, provinces and implementing agencies. The IDMS was designed to support and accompany the implementation of the National Development Plan (NDP) 2010-2014, which envisages approximately 3000 projects with a total value of US$186 billion to be implemented over the coming five years. This system was designed in collaboration by teams of experts from the Ministry of Planning, USAID/Tatweer, the UNDP, and Synergy International Systems. The IDMS will foster accountability and transparency in managing development resources in Iraq.
The IDMS is hosted on a secure server within the Ministry of Planning in Baghdad. However, users are able to access the system online. An offline version is also available for users with slower internet connectivity. Due to the cutting-edge processes and technology used to integrate JavaScript with Oracle 11g, this system is wholly capable of managing the complex portfolio of development projects across all of the 18 provinces of Iraq. Users of the system will include MoP staff, line ministries, governors' offices, executive offices of the GOI, and donor organizations.
ANALYTICS & REPORTING GUIDES
IDMS Analytics
IDMS Handbook
DATA ENTRY GUIDES
External Assistance Projects
Capital Investment Projects
Donor Profile
NDP Indicators
Standard Operating Procedures
LOGIN AS A GUEST
User Name
Password
Request a new account
Forgot your password?
LOGIN
Supported by:
USAID | IRAQ
TATWEER
UNOPS
Powered by IDM 6.5
Copyright © 2001-2014 Synergy International Systems, Inc.
Browser Requirement: Internet Explorer 9.0.

Figure 1: IDMS Application Login Screen

A successful login directs you to the *My Workspace* module of the *IDMS* application.

You may switch the login screen language of *IDMS* into Arabic by pressing عربي link in the right upper corner of the page.

Note: If you have forgotten your password, you can retrieve it by clicking the **Forgot Your Password?** link in the *Login Screen* and confirming your identity. After submitting your identity information, you will receive the password into the e-mail account indicated.

4.1 Registering for a Username and Password

New users can sign up for a username and password to start using the system.

In order to register in the system, follow the steps described below:

1. Click the **Request a New Account** link at the bottom of the *Login Screen*. A *User Registration Form* (Figure 2) will appear.
2. Fill in the information requested.
3. Click the **Submit** button to submit the information provided.

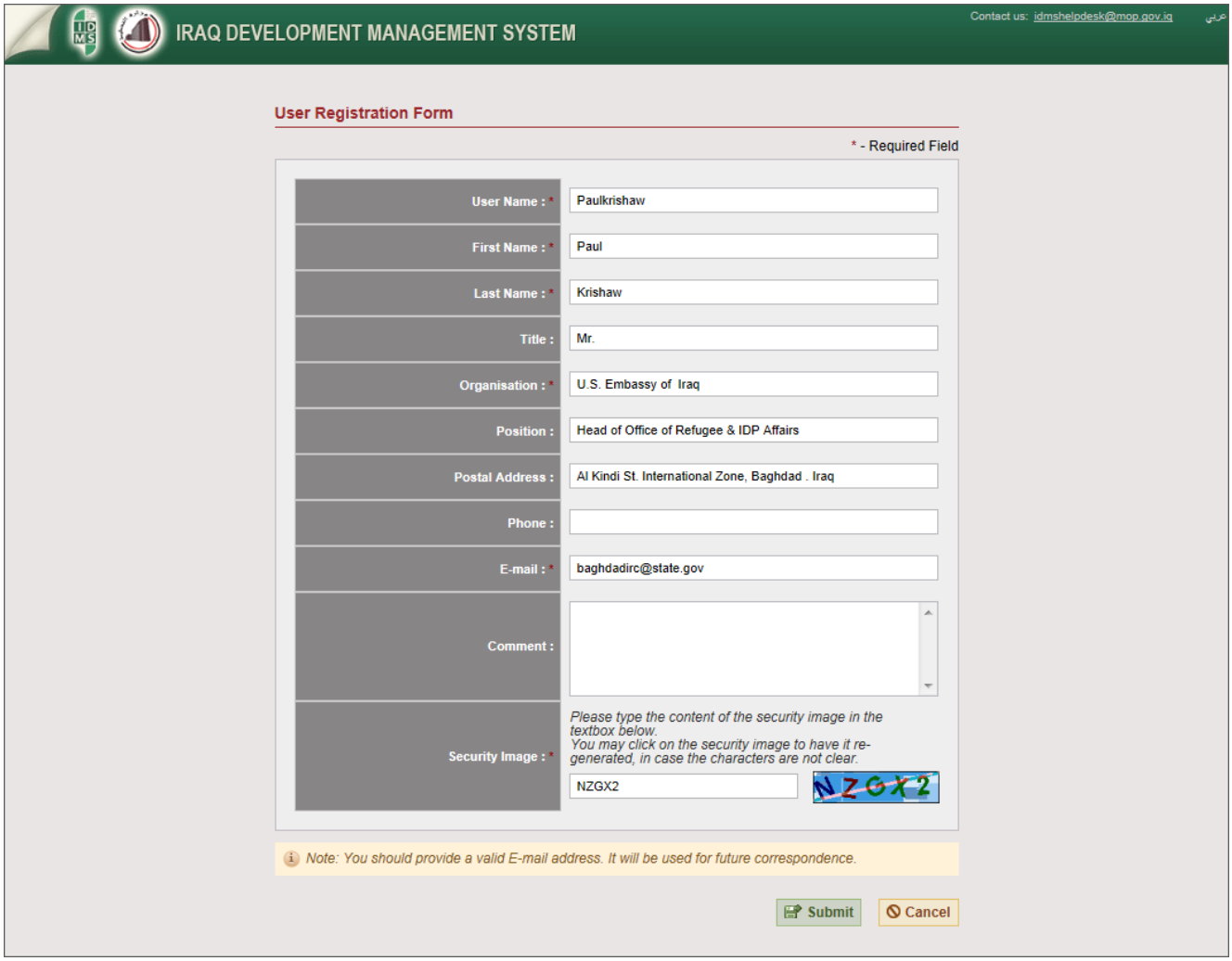
IRAQ DEVELOPMENT MANAGEMENT SYSTEM
Contact us: idmshelpdesk@mop.gov.iq
عربي
User Registration Form
* - Required Field
User Name : *
Paulkrishaw
First Name : *
Paul
Last Name : *
Krishaw
Title :
Mr.
Organisation : *
U.S. Embassy of Iraq
Position :
Head of Office of Refugee & IDP Affairs
Postal Address :
Al Kindi St. International Zone, Baghdad . Iraq
Phone :
E-mail : *
baghdadirc@state.gov
Comment :
Security Image : *
Please type the content of the security image in the textbox below.
You may click on the security image to have it re-generated, in case the characters are not clear.
NZGX2
Note: You should provide a valid E-mail address. It will be used for future correspondence.
Submit
Cancel

Figure 2: User Registration Form

Once you submit the registration form, the IDMS administrator receives a notification. The administrator will review the information submitted and either approve the application or reject it. In case the application is approved, you will receive an e-mail message to the provided e-mail address. The e-mail will contain your login information details (username and automatically generated password) and the link to the IDMS login page.

Once logged in with the received username/password, you can manage your details, i.e. change personal data and the password. To edit personal details, log into the application, go to the *My Profile* section (Figure 3) and make the appropriate changes.

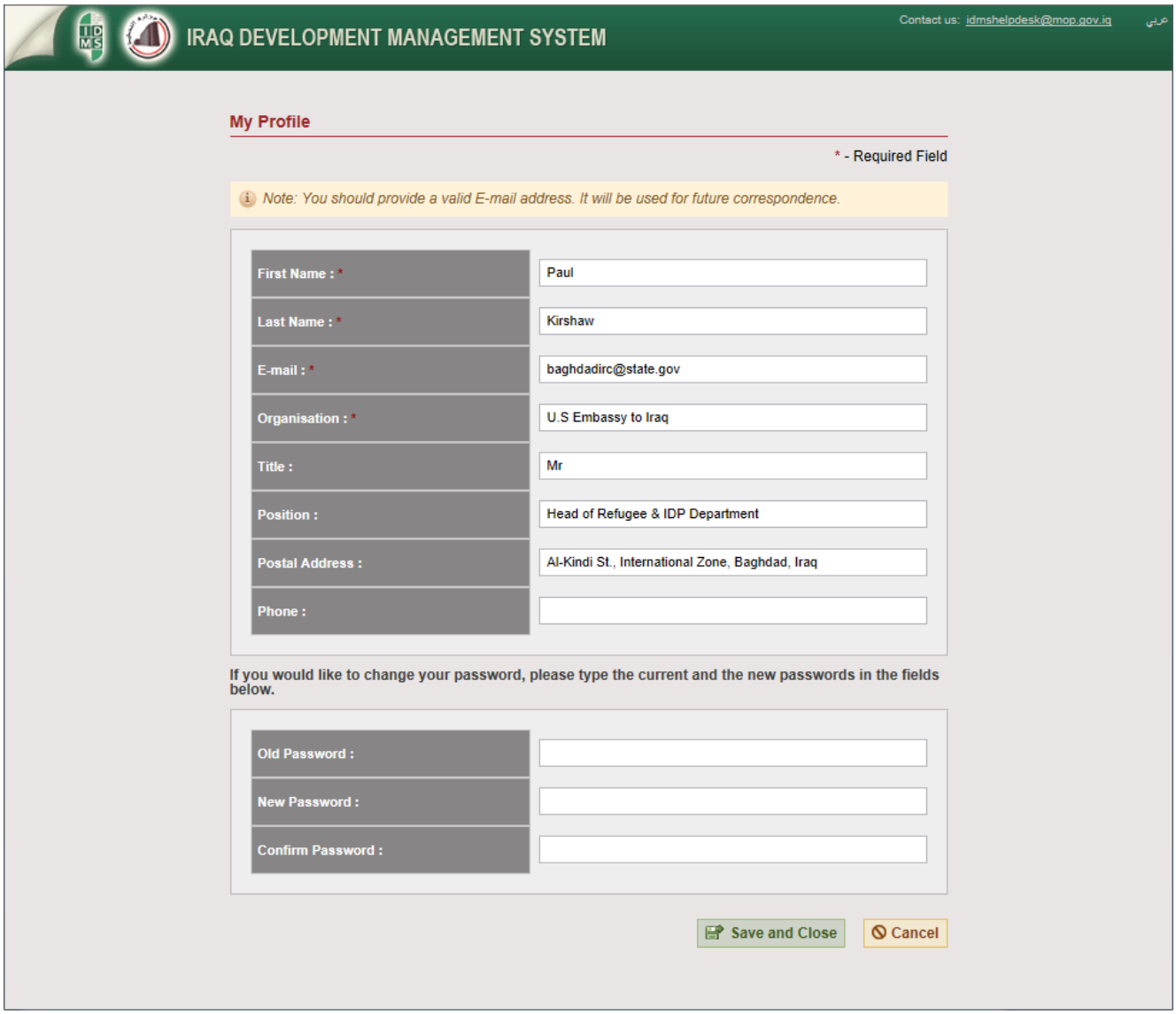

Figure 3: My Profile Section

4.2 Accessing IDMS without Registration

To ensure more flexibility and to provide access to the project data to a wider range of users, the system is designed in such a way that it allows public users to enter it without having to register for a username and password. Although, public users have access to the project data, they are not able to create new projects or modify / delete the existing ones.

Public users wishing to view project data should click the **LOGIN AS A GUEST** button (Figure 1). They will be directed to the *List* module of the *IDMS* application.

5. IDMS ANALYTICS STRUCTURE

IDMS consists of the following main sections:

- MY WORKSPACE MODULE – used for quick access to the projects registered in the *IDMS* system by the user's group.
- LIST MODULE – used to create and execute ad-hoc queries on the data and acquire results in the form of a list.
- CHART MODULE – used to filter and display the data in a chart form.
- MAP MODULE - used to filter and display the data in a map form.
- REPORT MODULE – generates complex reports over one or more criteria and presents the output in the printable and user-friendly format.
- DASHBOARD MODULE - used for quick access to the projects registered in the *IDMS* system.

The *IDMS* main window has a complex preview as it is shown in Figure 4.

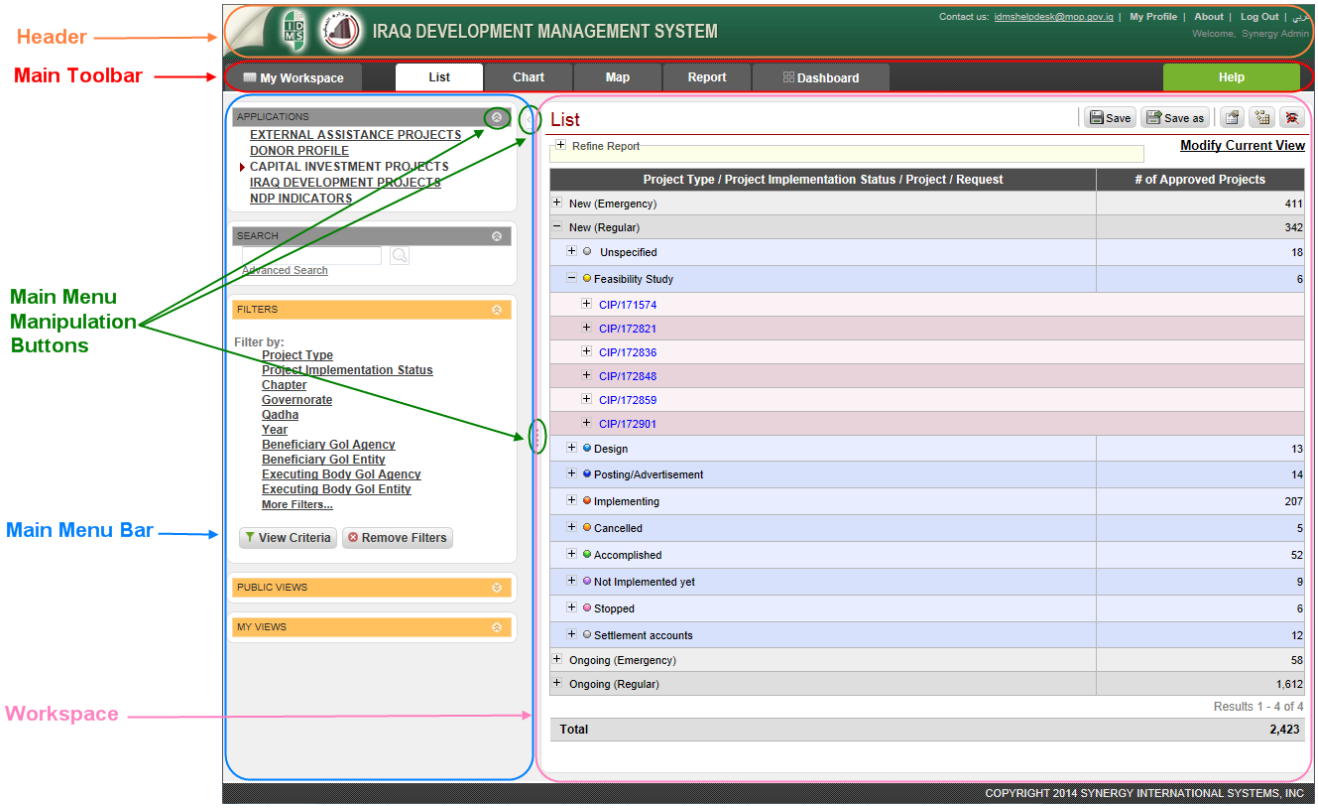

Figure 4: IDMS Analytics Structure

It contains the following components:

Component Name	Description
Header	This is the application header that contains application name and the IDMS logo. On the right side, the following functions are available: • **Contact Us** – e-mail address of the IDMS System Administrator.

	• **My Profile** – this opens your personal settings and details. For details, see Registering for a Username and Password. • **About** – opens the *IDMS* information window. • **Log Off** – this button is used to log off the application.
Main Toolbar	This is the main toolbar of the *IDMS* application. The following tabs are available here: • **My Workspace** – opens the MY WORKSPACE MODULE to manage user specific projects. • **List** – opens the LIST MODULE of the selected Application (see Main Menu description below). • **Chart** –opens the CHART MODULE. • **Map** –opens the MAP MODULE. • **Report** - opens the REPORT MODULE. • **Dashboard** – opens the DASHBOARD MODULE for quick access to the projects registered in the *IDMS* system. • **Help** – opens the *IDMS* application help.
Main Menu Bar	This menu contains sections with main functions of the IDMS application: • **Application** – lists all applications present in *IDMS*. • **Search** – contains a common and advanced search functions among the selected application list. For details, see SEARCH. • **Filter** – contains filtering options. For details, see FILTERING. • **Public Views/Charts/Maps/Reports** – memorized views / charts / maps / reports (depending on the opened module) available to all users of the application. • **My Views/Charts/Maps/Reports** – memorized views / charts / maps / reports (depending on the opened module) created by and available to the current user only.
Main Menu Manipulation Buttons	• **Left/Right arrows** ( ) – used to hide/open the Main Menu bar. • **Up/Down arrows** ( ) – used to collapse/expand the section in the Main Menu bar. • **Frame Divider** – used to adjust the width of the Main Menu bar.
Workspace	In this frame, all applications and modules are managed. Here are filtering and search results displayed.

6. MY WORKSPACE MODULE

The *My Workspace* section (Figure 5) of the *IDMS* application provides quick access to the projects and indicators created by the corresponding user.

In order to access the *My Workspace* module, click the **My Workspace** tab in the *Main Menu* of the *IDMS* application. Editing permissions for records in the *My Workspace* can be based on the user (whether the user has created the record) or user's group (whether someone from the group user belongs to has created the record). All these permissions are granted and managed from IDMS Administration Center (see *IDMS Administration Center User Manual* in REFERENCES).

The *My Workspace* contains the following sections:

- **External Assistance Projects** – the draft and submitted external assistance projects are displayed here. See External Assistance Projects in My Workspace Module.
- **Capital Investment Projects** - the draft requests and approved capital investment projects are displayed here. See Capital Investment Projects in My Workspace Module.
- **NDP Indicators** – the National Development Plan Indicators are displayed here. See NDP Indicators in My Workspace Module.

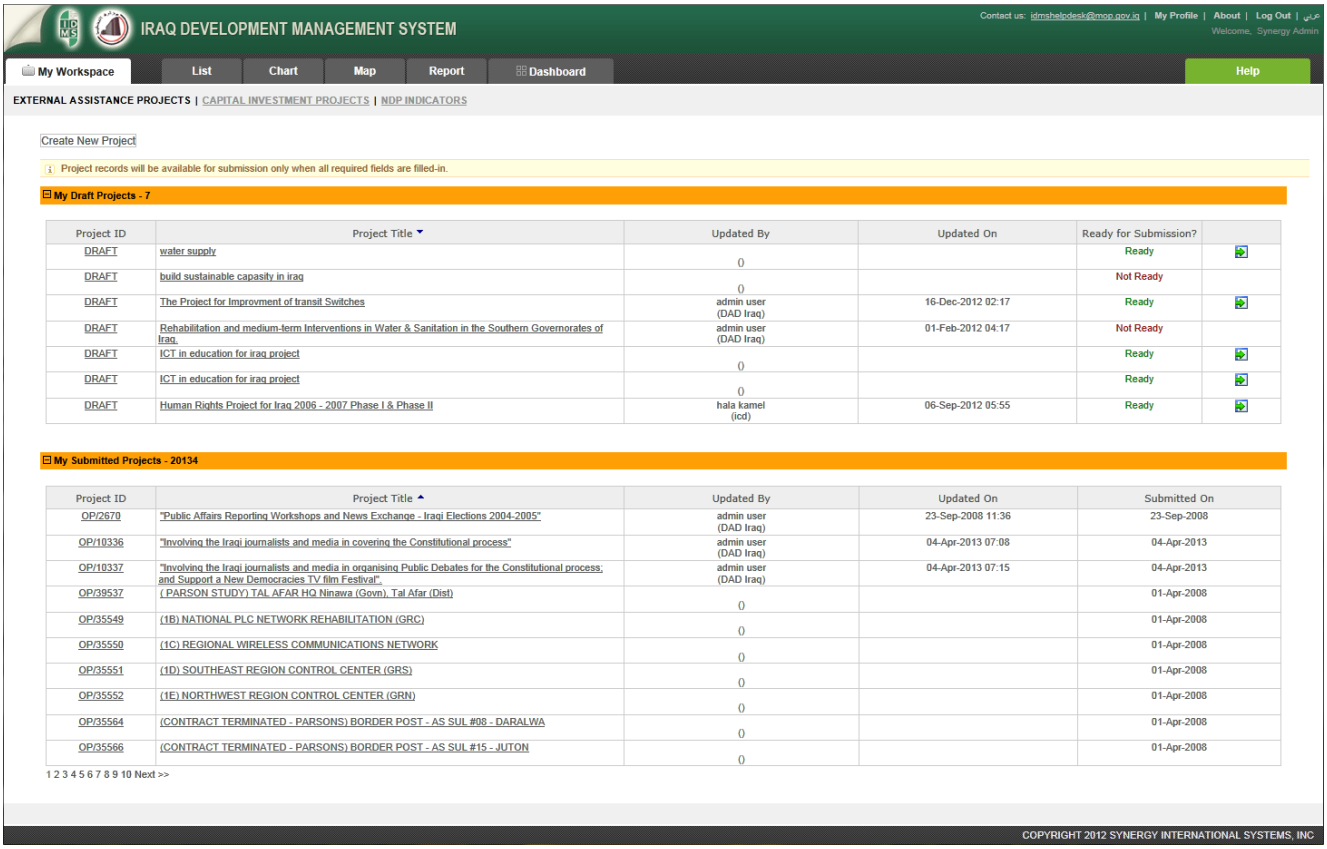
IRAQ DEVELOPMENT MANAGEMENT SYSTEM
Contact us: idmshelpdesk@mop.gov.iq | My Profile | About | Log Out | عربي
Welcome, Synergy Admin
My Workspace
List
Chart
Map
Report
Dashboard
Help
EXTERNAL ASSISTANCE PROJECTS | CAPITAL INVESTMENT PROJECTS | NDP INDICATORS
Create New Project
Project records will be available for submission only when all required fields are filled-in.
My Draft Projects - 7
Project ID | Project Title | Updated By | Updated On | Ready for Submission?
DRAFT | water supply | 0 | | Ready
DRAFT | build sustainable capasity in iraq | 0 | | Not Ready
DRAFT | The Project for Improvment of transit Switches | admin user (DAD Iraq) | 16-Dec-2012 02:17 | Ready
DRAFT | Rehabilitation and medium-term Interventions in Water & Sanitation in the Southern Governorates of Iraq. | admin user (DAD Iraq) | 01-Feb-2012 04:17 | Not Ready
DRAFT | ICT in education for iraq project | 0 | | Ready
DRAFT | ICT in education for iraq project | 0 | | Ready
DRAFT | Human Rights Project for Iraq 2006 - 2007 Phase I & Phase II | hala kamel (icd) | 06-Sep-2012 05:55 | Ready
My Submitted Projects - 20134
Project ID | Project Title | Updated By | Updated On | Submitted On
OP/2670 | "Public Affairs Reporting Workshops and News Exchange - Iraqi Elections 2004-2005" | admin user (DAD Iraq) | 23-Sep-2008 11:36 | 23-Sep-2008
OP/10336 | "Involving the Iraqi journalists and media in covering the Constitutional process" | admin user (DAD Iraq) | 04-Apr-2013 07:08 | 04-Apr-2013
OP/10337 | "Involving the Iraqi journalists and media in organising Public Debates for the Constitutional process; and Support a New Democracies TV film Festival". | admin user (DAD Iraq) | 04-Apr-2013 07:15 | 04-Apr-2013
OP/39537 | (PARSON STUDY) TAL AFAR HQ Ninawa (Govn), Tal Afar (Dist) | 0 | | 01-Apr-2008
OP/35549 | (1B) NATIONAL PLC NETWORK REHABILITATION (GRC) | 0 | | 01-Apr-2008
OP/35550 | (1C) REGIONAL WIRELESS COMMUNICATIONS NETWORK | 0 | | 01-Apr-2008
OP/35551 | (1D) SOUTHEAST REGION CONTROL CENTER (GRS) | 0 | | 01-Apr-2008
OP/35552 | (1E) NORTHWEST REGION CONTROL CENTER (GRN) | 0 | | 01-Apr-2008
OP/35564 | (CONTRACT TERMINATED - PARSONS) BORDER POST - AS SUL #08 - DARALWA | 0 | | 01-Apr-2008
OP/35566 | (CONTRACT TERMINATED - PARSONS) BORDER POST - AS SUL #15 - JUTON | 0 | | 01-Apr-2008
1 2 3 4 5 6 7 8 9 10 Next >>
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Figure 5: My Workspace Section

6.1 External Assistance Projects in My Workspace Module

In this page you may see a list of draft and submitted external assistance projects. Each project created in *IDMS* either from the *My Workspace* module or from the corresponding application should get submitted first in order to become public and official. Below is the procedure of project submission:

- The user adds an external assistance project. It is saved as a draft in the user's workspace, in the *My Draft Projects* list (Figure 6). Drafts may also be viewed and edited by other users that have the corresponding permissions. Further, drafts should be revised by the user or by the corresponding project manager.
- If all mandatory fields are filled in the project form, then draft gets a 'Ready' state in the *Ready for Submission?* column of the drafts table. If at least one mandatory field is not yet filled, the draft has 'Not Ready' state.
- Only drafts with the 'Ready' state can be submitted. To submit a draft, press the **Submit** button ( ) in the *My Draft Projects* table.

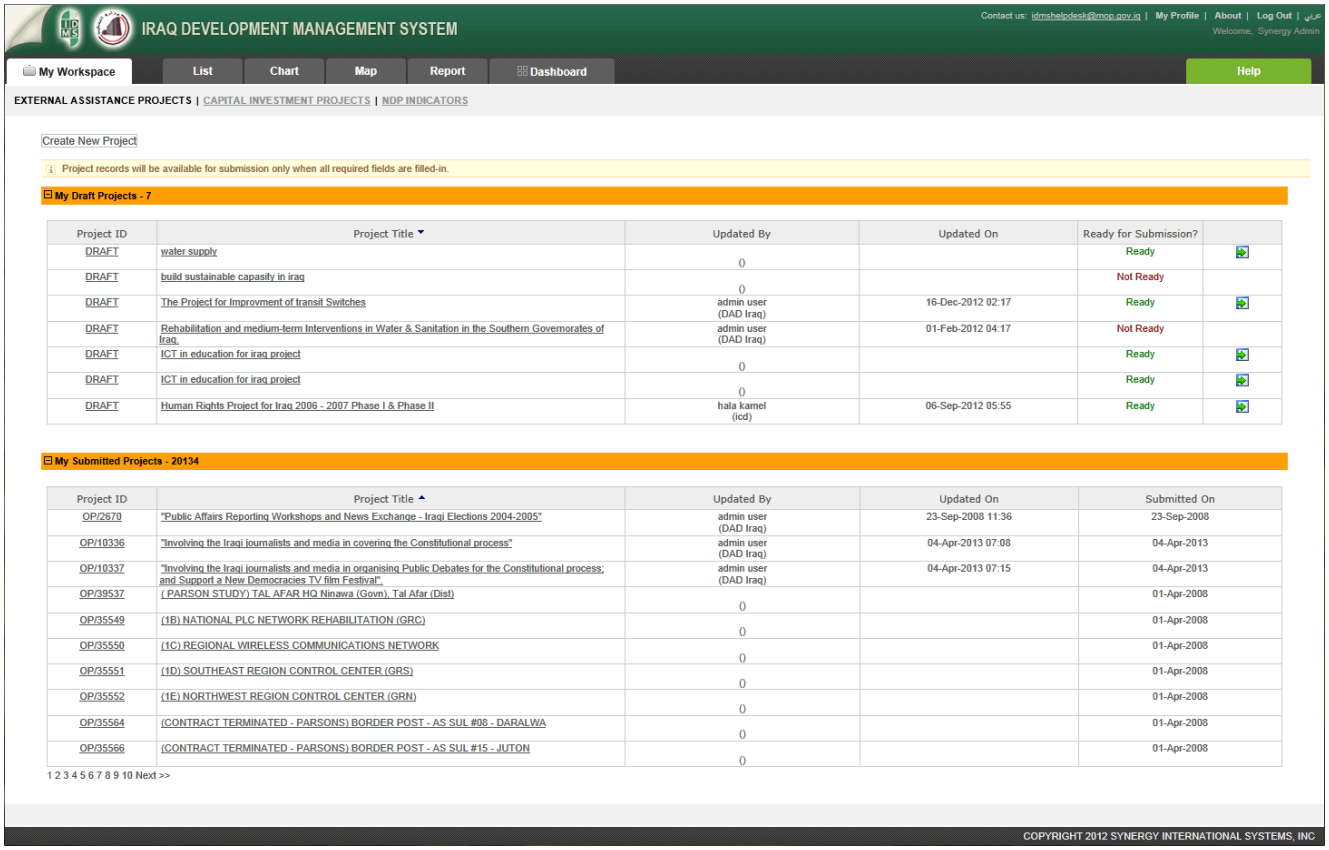
IRAQ DEVELOPMENT MANAGEMENT SYSTEM
Contact us: idmshelpdesk@mop.gov.iq | My Profile | About | Log Out
Welcome, Synergy Admin
My Workspace
List
Chart
Map
Report
Dashboard
Help
EXTERNAL ASSISTANCE PROJECTS | CAPITAL INVESTMENT PROJECTS | NDP INDICATORS
Create New Project
Project records will be available for submission only when all required fields are filled-in.
My Draft Projects - 7
Project ID | Project Title | Updated By | Updated On | Ready for Submission?
DRAFT | water supply | 0 | | Ready
DRAFT | build sustainable capasity in iraq | 0 | | Not Ready
DRAFT | The Project for Improvment of transit Switches | admin user (DAD Iraq) | 16-Dec-2012 02:17 | Ready
DRAFT | Rehabilitation and medium-term Interventions in Water & Sanitation in the Southern Governorates of Iraq. | admin user (DAD Iraq) | 01-Feb-2012 04:17 | Not Ready
DRAFT | ICT in education for iraq project | 0 | | Ready
DRAFT | ICT in education for iraq project | 0 | | Ready
DRAFT | Human Rights Project for Iraq 2006 - 2007 Phase I & Phase II | hala kamel (icd) | 06-Sep-2012 05:55 | Ready
My Submitted Projects - 20134
Project ID | Project Title | Updated By | Updated On | Submitted On
OP/2670 | "Public Affairs Reporting Workshops and News Exchange - Iraqi Elections 2004-2005" | admin user (DAD Iraq) | 23-Sep-2008 11:36 | 23-Sep-2008
OP/10336 | "Involving the Iraqi journalists and media in covering the Constitutional process" | admin user (DAD Iraq) | 04-Apr-2013 07:08 | 04-Apr-2013
OP/10337 | "Involving the Iraqi journalists and media in organising Public Debates for the Constitutional process; and Support a New Democracies TV film Festival". | admin user (DAD Iraq) | 04-Apr-2013 07:15 | 04-Apr-2013
OP/39537 | (PARSON STUDY) TAL AFAR HQ Ninawa (Govn), Tal Afar (Dist) | 0 | | 01-Apr-2008
OP/35549 | (1B) NATIONAL PLC NETWORK REHABILITATION (GRC) | 0 | | 01-Apr-2008
OP/35550 | (1C) REGIONAL WIRELESS COMMUNICATIONS NETWORK | 0 | | 01-Apr-2008
OP/35551 | (1D) SOUTHEAST REGION CONTROL CENTER (GRS) | 0 | | 01-Apr-2008
OP/35552 | (1E) NORTHWEST REGION CONTROL CENTER (GRN) | 0 | | 01-Apr-2008
OP/35564 | (CONTRACT TERMINATED - PARSONS) BORDER POST - AS SUL #08 - DARALWA | 0 | | 01-Apr-2008
OP/35566 | (CONTRACT TERMINATED - PARSONS) BORDER POST - AS SUL #15 - JUTON | 0 | | 01-Apr-2008
1 2 3 4 5 6 7 8 9 10 Next >>
COPYRIGHT 2012 SYNERGY INTERNATIONAL SYSTEMS, INC.

Figure 6: External Assistance Projects Section in My Workspace

Note: Only submitted drafts are displayed in the *List* table of the *External Assistance Projects* application (see LIST MODULE) and accessible to other users of the *IDMS* application.

In this section, an external assistance project may be created; details of existing projects can be viewed and edited.

The information displayed in the *My Workspace* for each project includes the following:

- **Project ID** – the code of the External Assistance Project,
- **Project Title** – the title of the External Assistance Project,
- **Updated By** – last update author,
- **Updated On** – last update date,
- **Ready for Submission?** – indicates whether all mandatory fields are provided in the project draft and it is ready to be submitted or not. If the project draft is ready to be submitted, a corresponding **Submit** button ( ) appears next to this column.

6.1.1 Adding an External Assistance Project

To add a new external assistance project from the *My Workspace* module, follow the instructions below:

1. Go to the **External Assistance Projects** tab of the *My Workspace* module.
2. Click the **Create New Project** button (Figure 6). This will open an *Add External Assistance Project* form which is described in the *External Assistance Projects Application User Manual*, see REFERENCES.

6.1.2 Viewing External Assistance Project Details

Depending on your permissions you may also see or edit external assistance projects added by other users.

To view details of drafts and submitted projects in the *My Workspace* module, follow the steps below:

1. Go to the **My Workspace** module.
2. Click the **External Assistance Project** tab.
3. Expand the corresponding **My Drafts Projects** or **My Submitted Projects** list (Figure 6).
4. Click the project you wish to see the details for. You will be directed to the *Details* section of the *External Assistance Projects* application. For more information, see DETAILS SECTION.

6.2 Capital Investment Projects in My Workspace Module

To create a capital investment project in *IDMS*, you should first add a project request, which should pass an approval procedure first and then become a project (see Regular Funding Request Approval Procedure). The approval of the project requests is handled by the MoP Investment Unit users. Before a project request gets approved, it should be first submitted as a draft request and then pass a revision cycle. The approved request is copied into a project entry, while request itself remains in the system as well. Both the submitted requests and the approved projects are visible from the LIST MODULE and are available for analytics in the CHART MODULE, MAP MODULE and REPORT MODULE of the *IDMS* application.

Note: To keep the project active, the responsible entity should re-submit the project request every year.

The **Capital Investment Project** section of the *My Workspace* module (Figure 7) is divided into three groups: **My Draft Funding Requests**, **Submitted Funding Requests** and **Approved Projects**. These lists display the draft and submitted project requests and the approved capital investment projects correspondingly.

Certain actions are available for each of these sections. For details see the corresponding list description below.

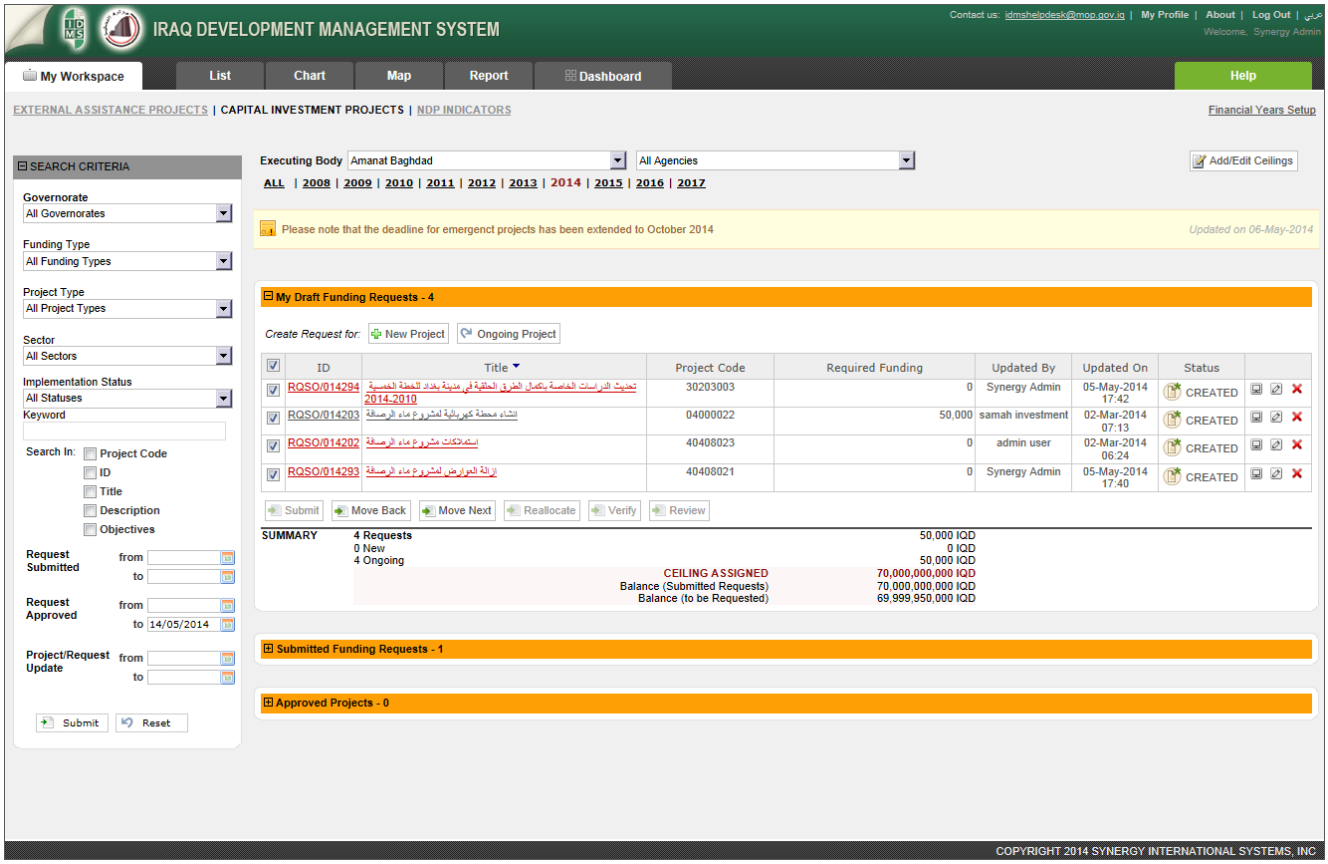

Figure 7: Capital Investment Projects Section in My Workspace

To start managing capital investment projects, select the **Executing Body** first. This will filter all projects for the selected entity. You may also select the **Agency** of the Executing Body to narrow down the list of projects to the specified agency. Finally, choose a **Year** to display the projects for. Once these selections are made, the filtered list of capital investment projects and the available functions will appear in the *Capital Investment Project* section.

On top of the *Capital Investment Project* section, there is an **Announcements** area where the MoP Investment Unit members and administrators can post any information related to the Capital Investment Project submission and approval procedures and any other relevant information (Figure 8). For details on how to manage announcements, see Managing Announcements.

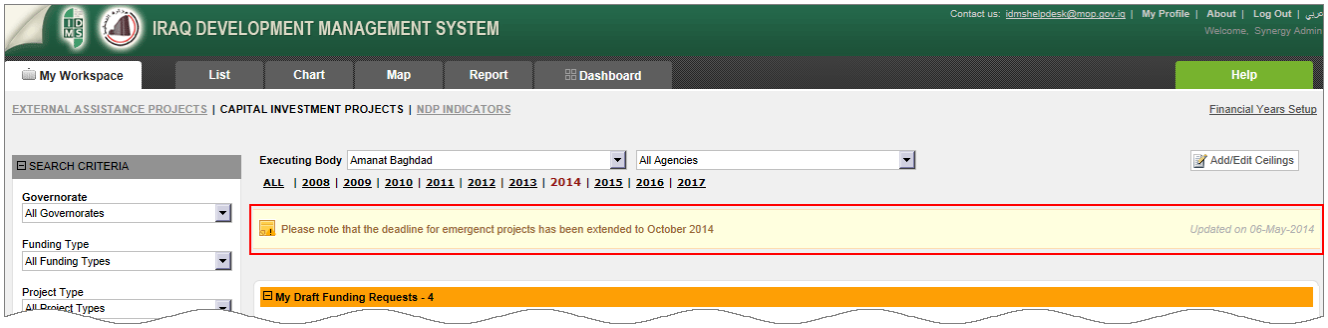
IRAQ DEVELOPMENT MANAGEMENT SYSTEM
Contact us: idmshelpdesk@mop.gov.iq | My Profile | About | Log Out
Welcome, Synergy Admin
My Workspace
List
Chart
Map
Report
Dashboard
Help
EXTERNAL ASSISTANCE PROJECTS | CAPITAL INVESTMENT PROJECTS | NDP INDICATORS
Financial Years Setup
SEARCH CRITERIA
Executing Body
Amanat Baghdad
All Agencies
Add/Edit Ceilings
ALL | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017
Governorate
All Governorates
Funding Type
All Funding Types
Project Type
Please note that the deadline for emergenct projects has been extended to October 2014
Updated on 06-May-2014
My Draft Funding Requests - 4

Figure 8: Announcements Area in the Capital Investment Projects Section

The **Financial Years Setup** link in the right upper side of the *Capital Investment Projects* section (Figure 9) leads to the Financial Years Setup form to select active years and define regular and emergency request submission dates.

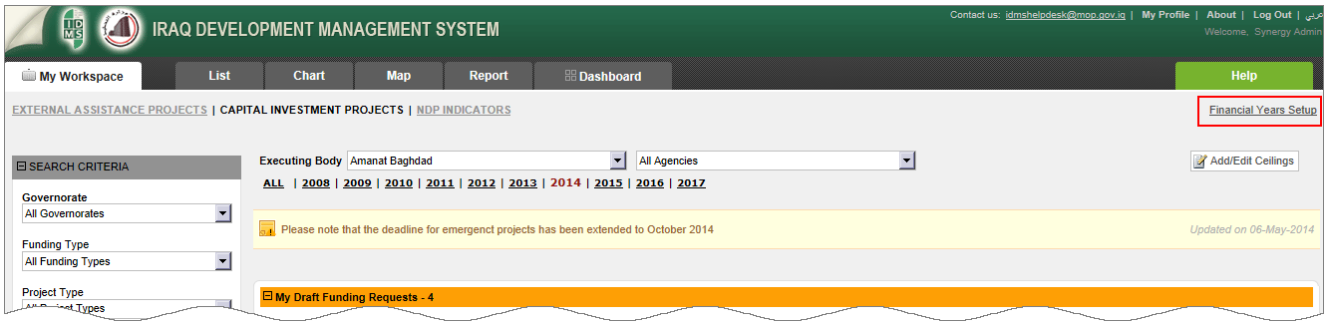
IRAQ DEVELOPMENT MANAGEMENT SYSTEM
Contact us: idmshelpdesk@mop.gov.iq | My Profile | About | Log Out
Welcome, Synergy Admin
My Workspace
List
Chart
Map
Report
Dashboard
Help
EXTERNAL ASSISTANCE PROJECTS | CAPITAL INVESTMENT PROJECTS | NDP INDICATORS
Financial Years Setup
SEARCH CRITERIA
Executing Body
Amanat Baghdad
All Agencies
Add/Edit Ceilings
ALL | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017
Governorate
All Governorates
Funding Type
All Funding Types
Project Type
Please note that the deadline for emergenct projects has been extended to October 2014
Updated on 06-May-2014
My Draft Funding Requests - 4

Figure 9: Financial Years Setup Link in the Capital Investment Projects Section

Requests are considered as *regular* if they are created within the regular request submission period. For regular requests, the workflow is described in Regular Funding Request Approval Procedure.

Requests created after the regular requests submission deadline has expired are considered as *emergency*. They can still be submitted if MoP will consider them important and if enough funding will be available. Emergency requests can be submitted with negative Balance (to be requested) and unless the Emergency submission date is not expired. For emergency requests, the workflow is described in Emergency Funding Request Approval Procedure.

The **Capital Investment Indicators** section in the *My Workspace* module is enriched with an advanced search mechanism. For details, see chapter Search in Capital Investment Projects.

The **Add/Edit Ceilings** button is used to adjust Budget Ceilings of GoI (Government of Iraq) entities for the corresponding year. This option is only available to the IDMS administrators and MoP Investment Unit group users. For details, see Adjust Budget Ceilings.

6.2.1 Managing Announcements

Note: Only the MoP Investment Unit members and administrators are allowed to manage the announcements in the *Capital Investment Projects* section.

If you have enough permission to edit announcements, click the **Add Announcement** link at the top of *Capital Investment Projects* section (Figure 10).

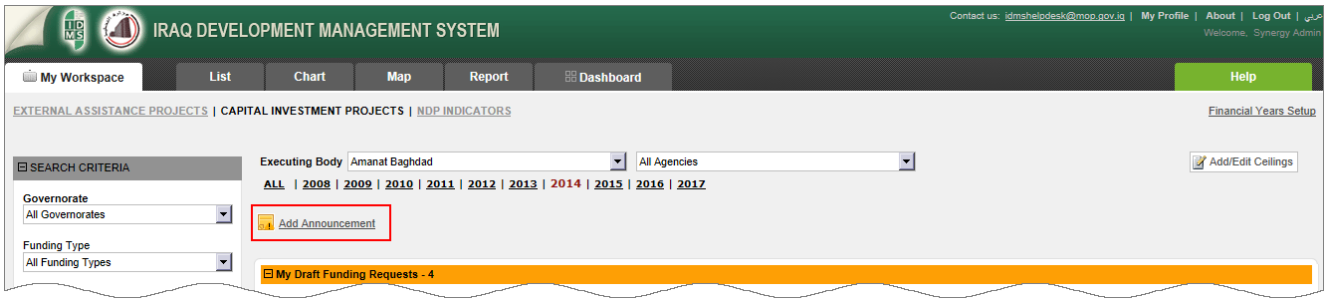

Figure 10: Add Announcements Button in Capital Investment Projects Section

This will activate the **Announcements** field (Figure 11).

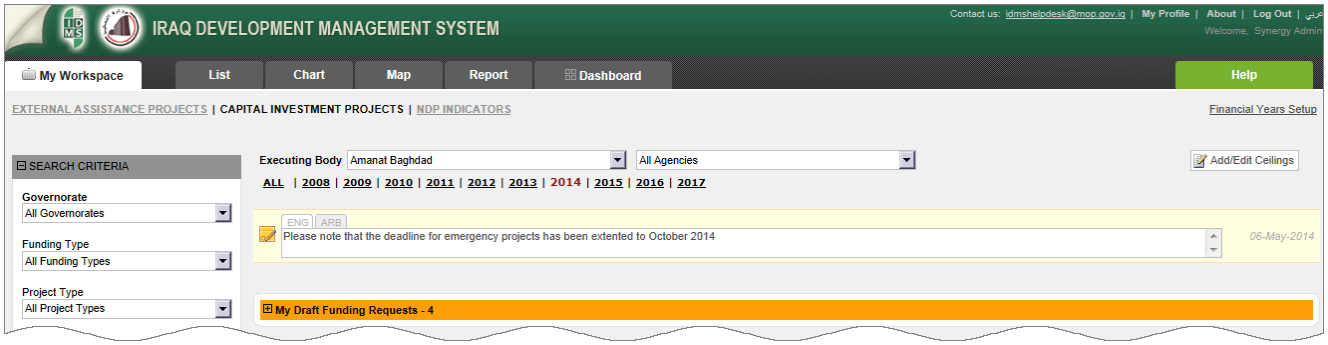

Figure 11: Editing Announcements Area in Capital Investment Projects Section

Enter the announcement text in the English and Arabic languages and press the **Submit Announcement** button ( ) to post the announcement. The date of the last update will be displayed in the *Announcement* area. To remove the posted announcement, activate the **Announcements** field by clicking it and remove the text of the announcement. If no announcement was made, regular users will not see the announcements area in the *Capital Investment Projects* section of the *My Workspace* module.

6.2.2 Financial Years Setup

In the **Financial Years Setup** window (Figure 12), active financial years should be selected for Capital Investment Projects.

Note: New projects can be created and ongoing projects may be accessed only for active years. No changes (i.e. editing or moving) could be made to the funding requests/projects associated with inactive years.

To set the year active, select the **Is Active** checkbox for the certain year.

To define the regular request submission period, select the **Regular Request Submission Start Date** and **Regular Request Submission End Date** from the corresponding fields. To define the emergency request submission end date, choose a date from **Emergency Request Submission**

End Date field. For all date fields in this window, a calendar popup is available, see Figure 13: Calendar.

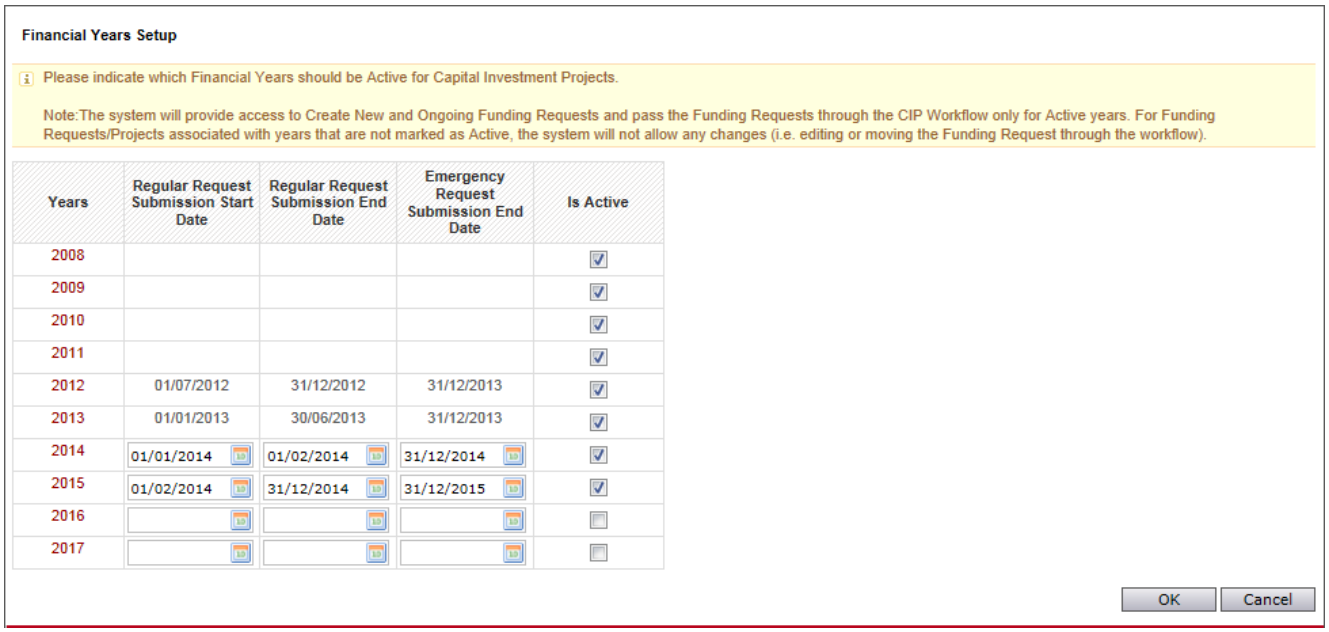
Financial Years Setup
Please indicate which Financial Years should be Active for Capital Investment Projects.
Note:The system will provide access to Create New and Ongoing Funding Requests and pass the Funding Requests through the CIP Workflow only for Active years. For Funding Requests/Projects associated with years that are not marked as Active, the system will not allow any changes (i.e. editing or moving the Funding Request through the workflow).
Years
Regular Request Submission Start Date
Regular Request Submission End Date
Emergency Request Submission End Date
Is Active
2008
2009
2010
2011
2012 01/07/2012 31/12/2012 31/12/2013
2013 01/01/2013 30/06/2013 31/12/2013
2014 01/01/2014 01/02/2014 31/12/2014
2015 01/02/2014 31/12/2014 31/12/2015
2016
2017
OK
Cancel

Figure 12: Financial Years Setup Window in My Workspace

Note: The *Regular Request Submission Start Date* should be before *Regular Request Submission End Date*, and *Emergency Request Submission End Date* should be after *Regular Request Submission End Date.*

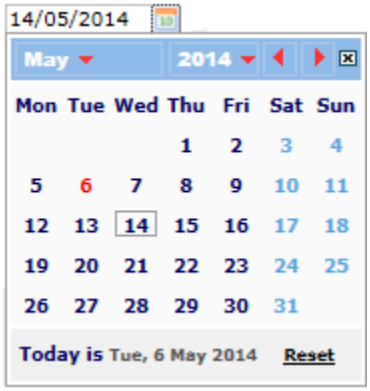

Figure 13: Calendar

6.2.3 My Draft Funding Requests

The **My Draft Funding Requests** list displays the draft requests created by the Executing Body group users. The following information is displayed in the list:

- **ID** – the system generated unique request code,
- **Title** – the title of the request,
- **Project Code** – the request related project code. If the request has been copied from some other project, you will see the code of the original project here.
- **Required Funding** – the funds requested in the request,
- **Updated By** – last update author,

- **Updated On** – last update date,
- **Status** - the status of the draft. Following values may be seen in this column:
  - **CREATED** – for initially created draft requests, both regular and emergency requests.
    Note: For definition of regular and emergency requests, see Capital Investment Projects in My Workspace Module.
  - **REQUIRING EMERGENCY FUNDING** – shows up for emergency requests only when no enough funding is available to process the request.
  - **EMERGENCY FUNDING REQUESTED** – shows up for emergency requests only when funding is requested for the request.
  - **EMERGENCY FUNDING VERIFIED** – shows up for emergency requests only when funding for the request has been verified.
  - **EMERGENCY FUNDING REVISION REQUESTED** – shows up for emergency requests only in the stage of funding revision.
  - **EMERGENCY FUNDING REJECTED** – shows up for emergency requests only when funding for the request has been rejected.
  - **EMERGENCY FUNDING APPROVED** – shows up for emergency requests only when funding for the request has been approved.
- **Actions** – you may view ( ), edit ( ) and delete ( ) the draft request.
  Note: The delete action is available to administrator or Executing Body users and serves as a permanent delete for the funding request (the record will be fully deleted from *IDMS*).

In the *My Draft Funding Requests* list, drafts are marked in red and grey colors. Red drafts are those that are still pending mandatory information to be provided and cannot be submitted at this stage. Grey drafts are ready for the submission.

Draft projects may be selected/deselected using checkboxes allocated to each entry in the table. The top checkbox located in the heading of the *My Draft Funding Requests* list is used to select/deselect all draft projects (Figure 14). Below are listed functions to perform over the selected drafts in the *My Draft Funding Requests* list:

Note: The functions described below are not available after the emergency request submission end date (see Financial Years Setup).

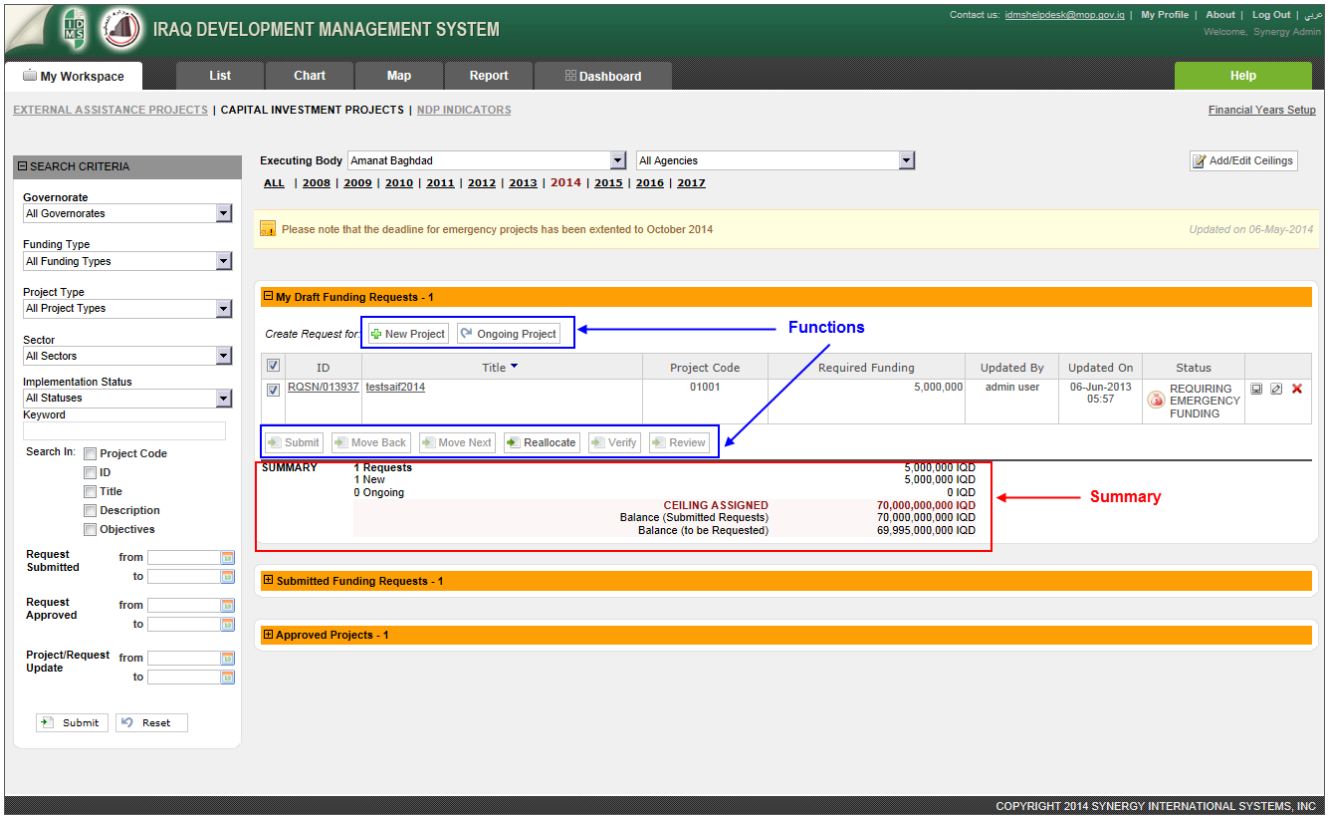

Figure 14: Functions and Summary in Draft List of Capital Investment Projects Section

- **New Project** – opens a form where a new project request may be created. For details on the *New Project* form, see *IDMS Capital Investments Projects Application User Manual* in REFERENCES.
- **Ongoing Project** – opens a list of approved projects for the selected Executing Body and/or Agency for the selected year (Figure 15). This list displays only projects marked other than Accomplished (set from the **Implementation Status** field described in *IDMS Capital Investments Projects Application User Manual*, see REFERENCES) and with the Start/End Dates spanning the selected year. Projects that already have an ongoing request created for the selected year are not listed here.
  By selecting the ongoing project, you may create a new request for the current year for that project. To do that, expand the GoI list, choose one or more ongoing projects and press **Create Draft** button. The new funding request will be generated with the unique *Request Code* and will appear in the *My Draft Funding Requests* list. The project **Type** for the new funding requests will be 'Ongoing'.
- **Adjust Funding Requests** – available for administrator and Executing Body group users and displays a list of GoI (Government of Iraq) entity the Executing Body is responsible for or the whole list of entities for the administrator. Here you may adjust the yearly allocations for the requests' local and foreign amounts. For details, see Adjust Project Funding Requests/Allocations.
  Note: This button is not available during emergency submission period when the regular project submission period is expired (see Financial Years Setup).
- **Submit**– submits all selected draft requests.
  Note: This button is only active when **Balance (to be Requested)** summary field has a positive value (for details on balance requirements, see below) and all selected drafts are

grey (all mandatory information is provided for them). This button goes inactive if at least one red draft is selected. For details on drafts coloring, see above.

- **Move Back** / **Move Next** – used to move the selected drafts to the previous/ next year. The moved funding requests will appear in the *My Draft Funding Requests* list for the previous/next year and will disappear from the same list for the current year.

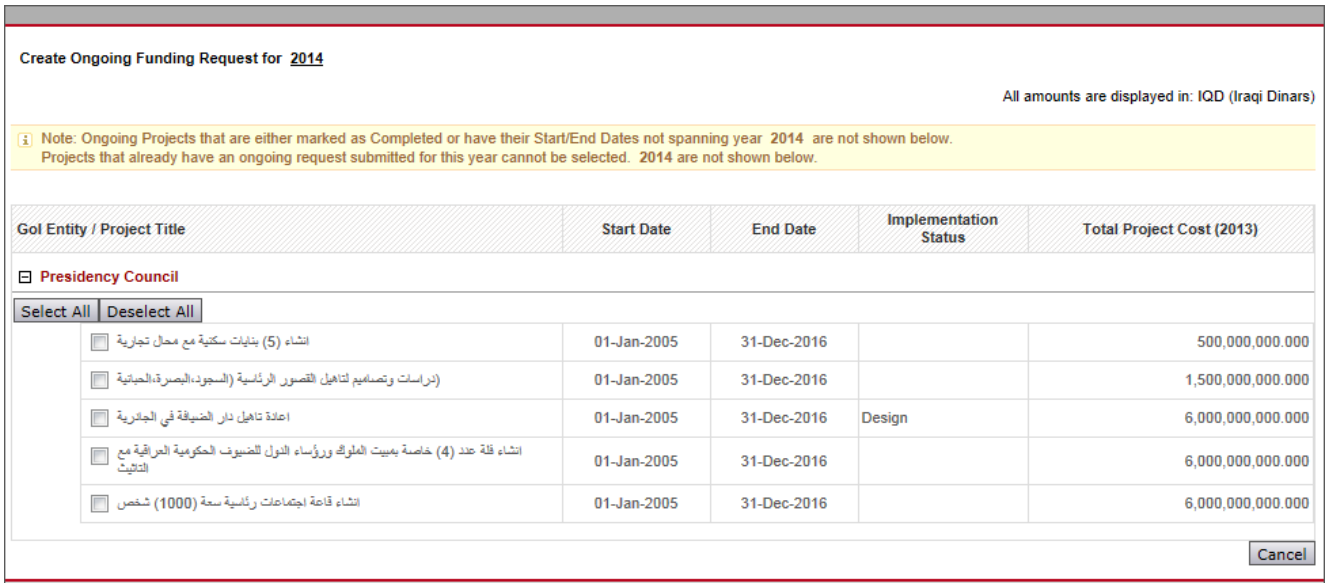

Figure 15: Create Ongoing Funding Request Window

The following buttons are used for emergency funding requests and are only available during emergency request submission period (see Financial Years Setup):

- **Reallocate** – used to start a reallocation procedure for the selected funding requests. Reallocation is performed for requesting additional funds from other projects of the selected ministry for the needs of the corresponding funding request.
- **Verify** – used to verify the emergency funding request. This button is inactive for regular funding requests.
- **Review -** used to review the emergency funding request. This button is inactive for regular funding requests.

The following summary is displayed for the **My Draft Funding Requests** list:

Note: This summary is only available when the *Executing Body* is specified in the *Capital Investment Project* section. See Capital Investment Projects in My Workspace Module.

- **Requests** – the number of draft requests in the list and the total required funds for those drafts.
- **New** – the number of new drafts in the list and the total required funds for those drafts.
- **Ongoing** – the number of ongoing drafts (requests created for ongoing projects) in the list and the total required funds for those drafts.
- **CEILING ASSIGNED** – the sum of *Planned Allocation* and *Rollover Amount* for the selected Executing Body, as defined in the *Adjust Budget Ceilings* form. For details, see Adjust Budget Ceilings.

Note: For emergency projects (see Capital Investment Projects in My Workspace Module), this is the sum of *Allocation Approved by MoP / CoM* and *Rollover Amount* for the selected Executing Body.

- **Balance (Submitted Requests) –** the remainder calculated based on the Assigned Ceiling and the total of all submitted requested funds.
- **Balance (to be Requested) -** the remainder calculated based on the Assigned Ceiling, the total of all draft and submitted requested funds.

6.2.4 Submitted Funding Requests

The **Submitted Funding Requests** list displays the submitted requests (Figure 16) created by the Assigned MoP Sectoral Unit group users. The following information is displayed in the list:

- **ID** – the code of the request. You will see the request code here if the request is copied from an approved project, and *New* for the new request for the selected year.
- **Title** – the title of the request,
- **Project Code** – the request related project code,
- **Required Funding** – the funds requested in the request,
- **Updated By** – last update author,
- **Updated On** – last update date,
- **Status** - the status of the submitted project describes its revision stage. The following statuses are available:
  - **ABANDONED** - appears when the project is abandoned.
    Note: The abandoned projects remain in the *Submitted Funding Requests* list for the current year and cannot be deleted.
  - **NEGOTIATION** – appears when project request is in a negotiation with the relevant Line Ministry.
  - **PENDING APPROVAL** – appears when the MoP Sectoral Unit requires further revisions made on the project request.
  - **PROCESSED** – appears when the project request has been accepted by the MoP Sectoral Unit and there are enough funds available (per assigned ceilings of the corresponding Executing Body, see Adjust Budget Ceilings).
  - **REJECTED** – appears when the project is rejected.
  - **REQUIRING FUNDING** – appears when there is lack of funds requested in the project.
  - **SUBMITTED** – appears when the project is submitted to the revision.
  - **UNDER PRIMARY REVIEW** – appears when the MoP Sectoral Unit is reviewing the project.
  - **UNDER SPECIALIZED REVIEW** – appears when a specialized review is necessary and the responsible MoP Sectoral Unit forwards the project request to another MoP Sectoral Unit for further advice.
  - **UNDERGOING REVISIONS** – appears when the MoP Sectoral Unit requires further revisions made on the project request.
  - **VERIFICATION** – appears when project is sent to verification internally within the MoP Sectoral Unit.

Submitted funding requests may be selected/deselected using checkboxes allocated to each entry in the table. The top checkbox located in the heading of the *Submitted Funding Requests* list is used to select/deselect all submitted projects.

The following functions are available for the **Submitted Funding Requests** list (Figure 16):

- **View** – you may filter the submitted requests in the *Submitted Funding Requests* list by the specific report status. The **View** drop-down list contains all statuses that the request can get in the submission cycle. By selecting the certain status from the list, only requests with the specific status will be displayed in the *Submitted Funding Requests* list.
- **Submit** – sends the selected requests for an approval.
  Note: This button appears when the selected requests passed a revision, have the status **PROCESSED** and when available funds exist in the Budget Ceilings (see Adjust Budget Ceilings). Please note, that if a GoI entity has other projects submitted, the available funds for the new project will be calculated depending on the ceiling allocated to the corresponding GoI entity and the funds already used by other approved projects for the selected year.

The following summary is displayed for the **Submitted Funding Requests** list:

- **Requests** – the number of submitted requests in the list and the total required funds for those requests.
- **New** – the number of new drafts in the list and the total required funds for those requests.
- **Ongoing** – the number of ongoing project requests (created for ongoing projects) in the list and the total required funds for those requests.
- **CEILING ASSIGNED** – the sum of *Allocation Approved by MoP / CoM* and *Rollover Amount* for the selected Executing Body, as defined in the *Adjust Budget Ceilings* form. For details, see Adjust Budget Ceilings.
- **Balance (to be allocated) -** the remainder calculated based on the Assigned Ceiling and the total of all submitted requested funds.

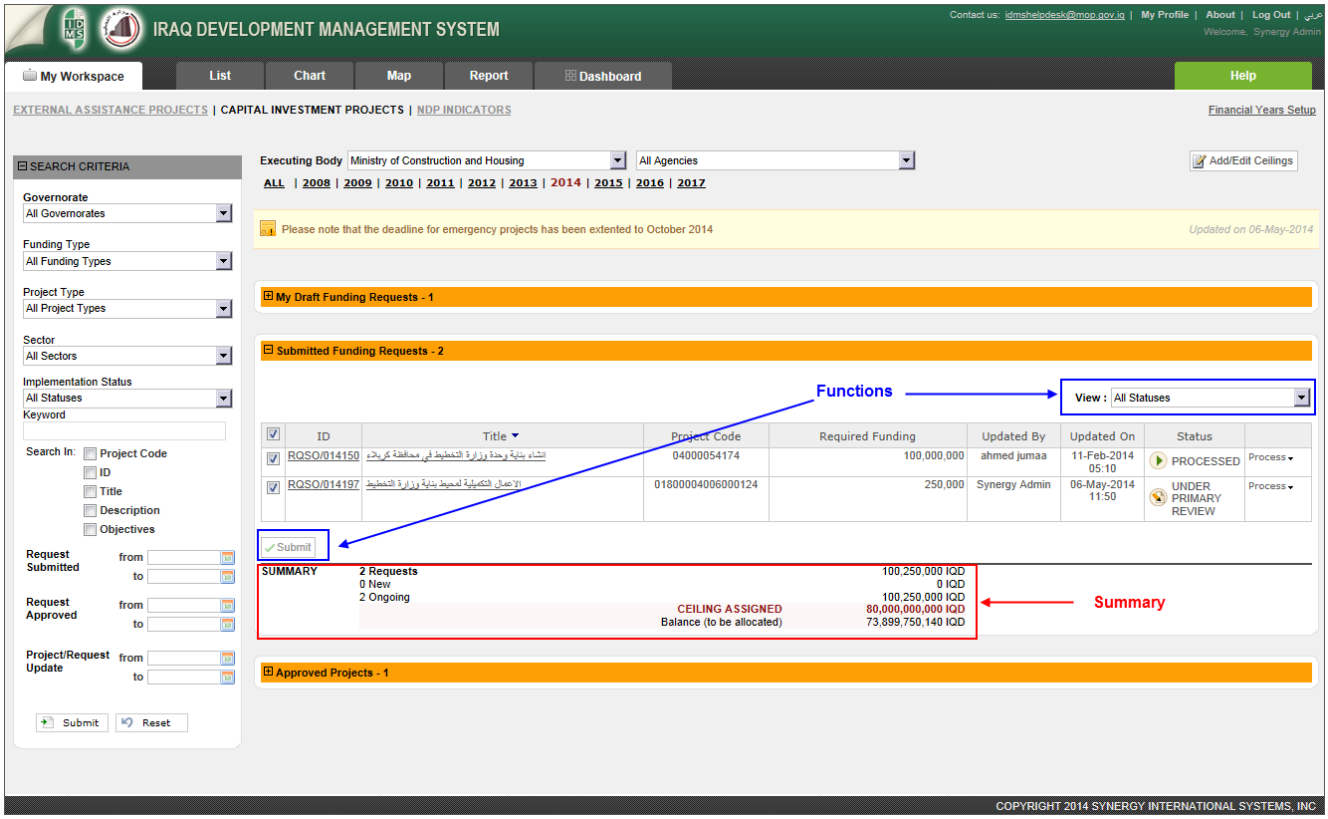

Figure 16: Functions and Summary in Submitted List of Capital Investment Projects Section

6.2.5 Approved Projects

The **Approved Projects** list displays projects approved by the MoP Investment Unit group users (Figure 17). The following information is displayed in the list:

- **ID** – the code of the request. You will see the request code here if the request is copied from an approved project, and *New* for the new request for the selected year.
- **Title** – the title of the project.
- **Project Code** – the project code.
- **Expended in Current Year** – the funds expended for the project in the selected year,
- **Expended (%)** – the expended funds from the originally approved amount allocated for the selected year.
- **Updated By** – last update author.
- **Updated On** – last update date.
- **Status** - the status of the submitted project describes its revision stage. The following statuses are available:
  - **STOPPED** – appears when the project is stopped. In this state, Yearly Allocation of the project can be set to 0. See Adjust Project Funding Requests/Allocations.
    Note: When the project is stopped, its implementation is suspended until it is continued. Once the project is continued, it is checked for the availability of funding for its implementation. If the appropriate funds are detected, the project status will be set to **APPROVED**. In case there is shortage of financial means, the project will move to the **REQUIRING FUNDING** stage and will remain in this state until the appropriate funds become available.
  - **APPROVED –** appears when the project is approved.
    CANCELLED – appears when the project is cancelled.

Note: When the project is cancelled, it becomes available for viewing purposes only. However, it still remains available for reporting and analysis.

- **REALLOCATION REQUESTED** – appears when the project has been requested for an additional funding.
- **REALLOCATION REVISION REQUESTED** – appears when reallocation request was not verified and sent back to the revision. This may happen due to lack of documents for the reallocation request or any other related information.
- **REALLOCATION VERIFIED** – appears when the project reallocation request is verified. During verification, Assigned MoP Sectoral Unit user should check and confirm reallocation documents and other request related information.
- **REALLOCATION APPROVED** – appears when enough funds are available for project reallocation.
- **REALLOCATION REQUIRING FUNDING –** appears when no enough funds are available for project reallocation.

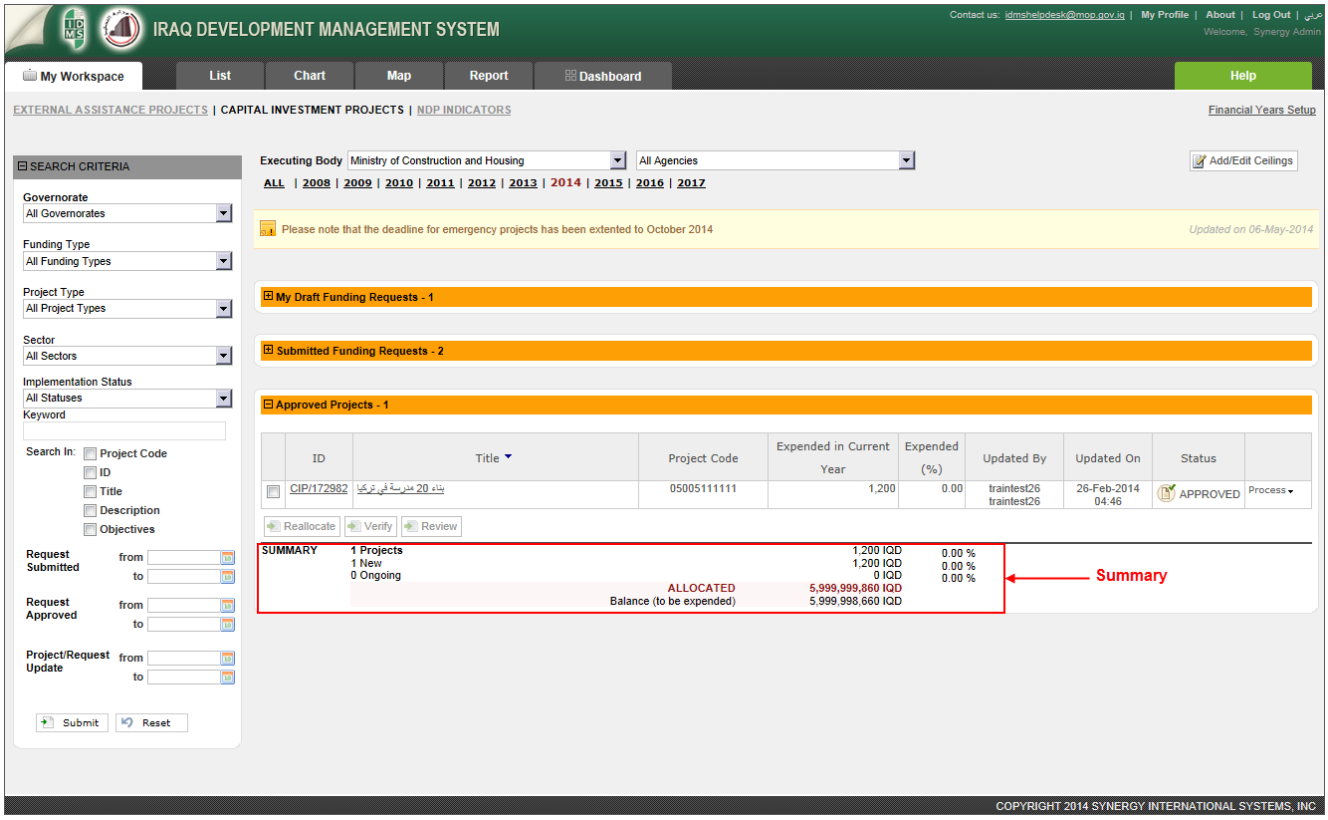

Figure 17: Summary in Approved List of Capital Investment Projects Section

The following summary is displayed for the **Approved Projects** list:

- **Projects** – the number of approved projects in the list and the total required funds for those projects.
- **New** – the number of new approved projects in the list and the total required funds for those projects.
- **Ongoing** – the number of ongoing approved projects (created for ongoing projects) in the list and the total required funds for those projects.
- **ALLOCATED** – the total funds allocated for all approved projects.

- **Balance (to be expended) –** the remainder calculated based on the Assigned Ceiling (see Adjust Budget Ceilings), the total of all draft and submitted requested funds.

The following buttons are used for emergency funding requests and are only available during emergency request submission period (see Financial Years Setup):

- **Reallocate** – used to start a reallocation procedure for the selected projects. Reallocation is performed to request additional funds from other projects of the selected ministry for the needs of the corresponding funding request.
- **Verify** – used to verify the reallocation request. This button is only active when project is in the reallocation phase.
- **Review -** used to review the reallocation request. This button is only active when project is in the reallocation phase.

6.2.6 Adjust Budget Ceilings

In the **Adjust Budget Ceilings** form (Figure 18 and Figure 19), adjust the Budget Ceilings of GoI (Government of Iraq) entity agencies for the corresponding year. The GoI entities are grouped in funds. Every GoI entity shows a list of underlying agencies for which the budget ceilings should be defined.

Note: The users can only be associated to Government Investment Fund and Regional Development Fund. Other funds in the list do not have any user associations.

Adjust Budget Ceilings of GoI Entities for Year 2014

* - Required Field

All amounts are displayed in: IQD (Iraqi Dinars)

Fund / GoI Entity / Agency	NDP Allocation	Planned Allocation	Allocation Approved by MoP / CoM	Allocation Approved by Parliament	Rollover Amount	Final Allocation
⊞ Government Investment Fund	2,000,000	2,480,002,000,000	2,480,002,000,000	20,471,004,000,000	1,000,000	20,471,005,000,000
⊞ Regional Development Fund	200,000,000,000	110,000,000,000	110,001,000,000	10,110,000,000		10,110,000,000
⊞ Petro-Dollar Fund						
Kurdistan Regional Government						
⊟ Other						
Anbar						
Baghdad						
Basrah						
Dhi Qar						
Kirkuk						
Najaf						
Ninawa						
Salah ad Din						
Agricultural Initiative Fund						
Marshes Development Fund						
TOTAL	200,002,000,000	2,590,002,000,000	2,590,003,000,000	20,481,114,000,000	1,000,000	20,481,115,000,000

Justification for changes *

ENG | ARB

The funds being provided under the budget modification are administrative costs, defend as usual and recognised overhead, including established indirect rules for agencies, management and oversight of specific programs funded under this title, and other types of program support such as quality assurance, qualtiy control, and related activities.

Attach Document * (e.g. project document, monitoring reports, and other)

تعقل	Added by admin user on 06/06/2013
تعقل2	Added by admin user on 06/06/2013
ثلاثة	Added by samah samah on 13/02/2014
ززززز	Added by samah samah on 17/02/2014
زززززززز	Added by samah samah on 18/02/2014
تخصيص لوزارة النقل	Added by alaae zeki on 20/02/2014
تخصيص نقل	Added by alaae zeki on 20/02/2014

Figure 18: Adjust Budget Ceilings Form – Part 1

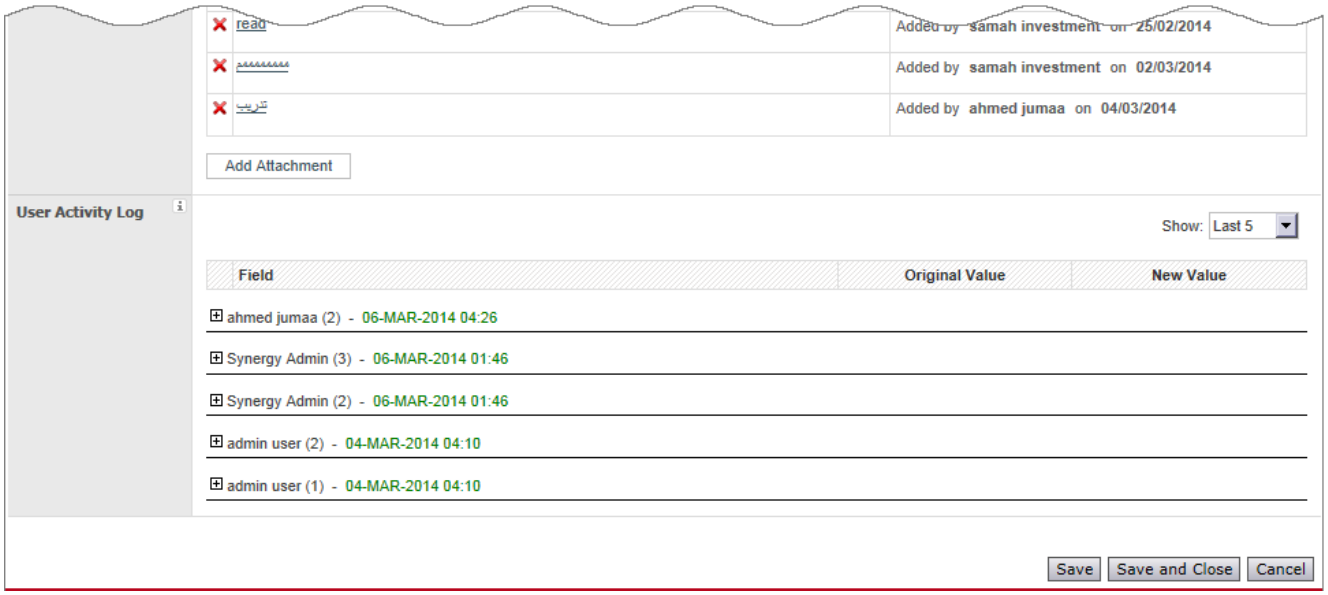

Figure 19: Adjust Budget Ceilings Form – Part 2

To insert budget ceiling data for the agency, you should expand the corresponding Fund / GoI entity / Agency by clicking the plus sign next to them.

In order to insert budget ceiling amounts for the selected GoI Entity / Agency, follow the steps below:

1. Click the (**Edit**) button to the left of the Government entity information on which you would like to edit. The following data input fields will appear:
   - **NDP Allocation**
   - **Planned Allocation**
   - **Allocation Approved by Mop / CoM**
   - **Allocation Approved by Parliament**
   - **Rollover Amount**
   - **Final Allocation** – this field expresses the summary of the Rollover Amount and Allocation Approved by Parliament, if available, otherwise Allocation Approved by Mop / CoM, if available. If, it is not available, then the Planned Allocation will be displayed.
2. Make the appropriate changes in the input fields and save them by clicking the **OK** button.

For each of the above data, the **Total** is calculated for all agencies in the GoI entity and for all GoI entities in the fund and is displayed in red color next to the corresponding fund and GoI entity name.

Note: All values in the *Adjust Budget Ceilings* form are displayed and inserted in the local currency IQD (Iraqi Dinar).
For each modification made to the ceilings, you should provide a comment in the **Justification for Changes** in both English and Arabic languages.

You may additionally attach any ceilings related attachments from **Attach Document** section. For details on how to attach documents or other related files, see *IDMS Capital Investments Projects Application User Manual* in REFERENCES.

The **User Activity Log** displays information about the recent changes made to the funds. Identifies the users who performed the changes and the date/time when the modifications were made.

Note: In the right side you may select the number of latest updates to be displayed or you may choose to display whole modification history on the particular record.

6.2.7 Adjust Project Funding Requests

In the *Adjust Project Funding Requests* form (Figure 20), you may see only those funds and GoI entities which you are allowed to manage. You may expand the list of requests/projects for the corresponding GoI entity by clicking the plus sign next to it. The **Foreign Currency**, as well as, **Project Cost** and **Total** are not editable in this form and are defined from each project details (see *IDMS Capital Investments Projects Application User Manual* in REFERENCES). The **Status** of the project indicates whether the project is approved or stopped.

The following information may be managed here for each project:

- **Local** – indicates the local funds requested by the project/request in the local currency IRQ (Iraqi Dinar). This value can be set to 0 from this form for the stopped projects only.
- **Foreign** - indicates the foreign funds requested by the project/request in the defined currency. This value can be set to 0 from this form for the stopped projects only.

Note: The sum of **Local** and **Foreign** funds should not exceed the *Project Cost* defined for the specific project. For details on how the *Project Cost* is defined, see *IDMS Capital Investments Projects Application User Manual* in REFERENCES.

The **Total** of local and foreign funds provided is automatically calculated, converted into local currency IRQ (Iraqi Dinar) and is displayed in red.

Additionally, the following summary information is displayed for each GoI:

- **Ceiling Assigned/Allocated** – the total ceilings for all listed drafts of the selected executing body, defined in the *Final Allocation* field of the Adjust Budget Ceilings form.
- **Balance (Submitted Requests) -** the remainder calculated based on the **Assigned Ceiling** and the total of all submitted and approved requested funds.
- **Balance (to be Requested) –** the remainder calculated based on the **Assigned Ceiling**, the total of all draft, submitted and approved requested funds.

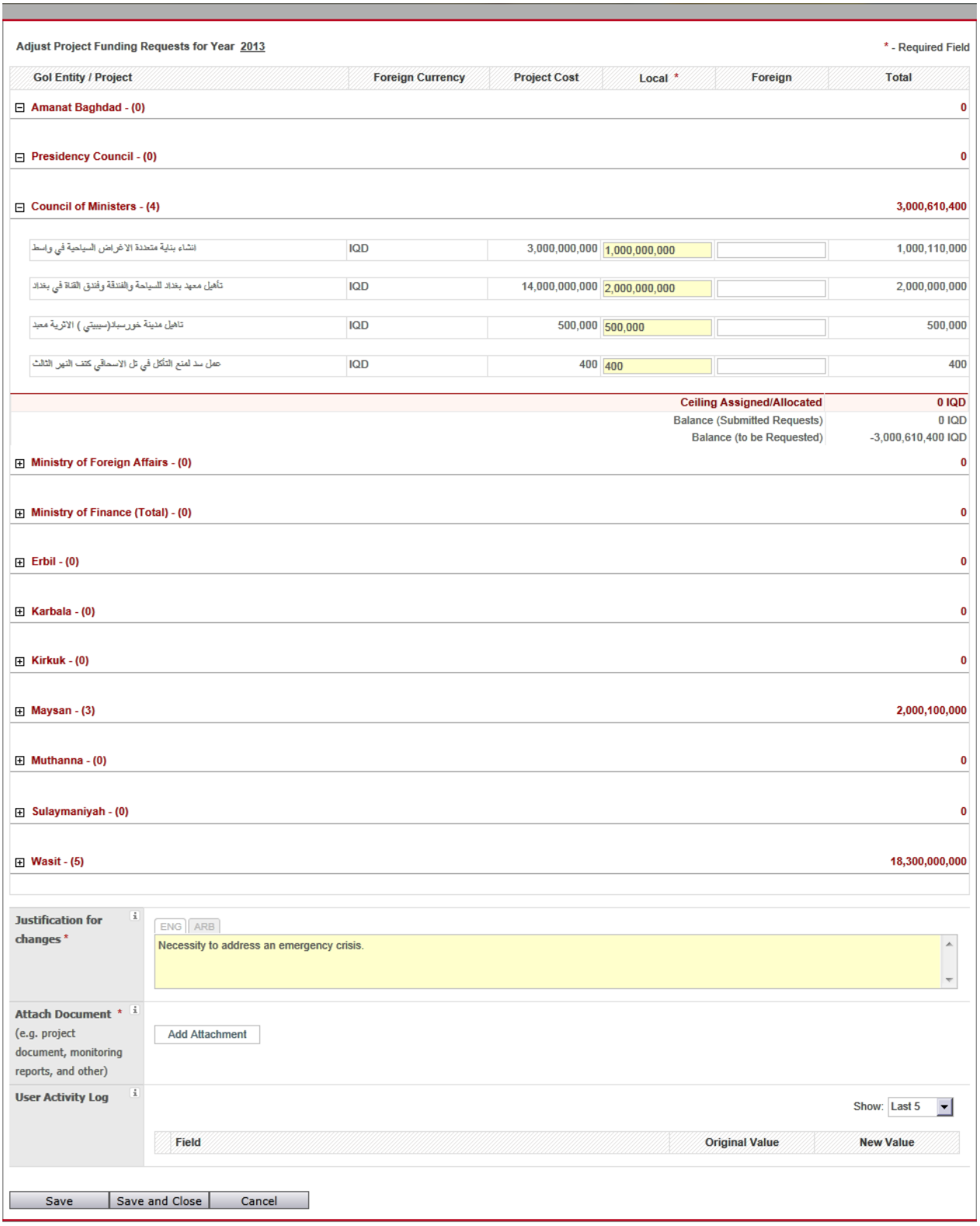
Adjust Project Funding Requests for Year 2013
* - Required Field
GoI Entity / Project
Foreign Currency
Project Cost
Local *
Foreign
Total
Amanat Baghdad - (0) 0
Presidency Council - (0) 0
Council of Ministers - (4) 3,000,610,400
انشاء بناية متعددة الاغراض السياحية في واسط IQD 3,000,000,000 1,000,000,000 1,000,110,000
تأهيل معهد بغداد للسياحة والفندقة وفندق القناة في بغداد IQD 14,000,000,000 2,000,000,000 2,000,000,000
تاهيل مدينة خورسباد(سيبيتي) الاثرية معبد IQD 500,000 500,000 500,000
عمل سد لمنع التآكل في تل الاسحاقي كتف النهر الثالث IQD 400 400 400
Ceiling Assigned/Allocated 0 IQD
Balance (Submitted Requests) 0 IQD
Balance (to be Requested) -3,000,610,400 IQD
Ministry of Foreign Affairs - (0) 0
Ministry of Finance (Total) - (0) 0
Erbil - (0) 0
Karbala - (0) 0
Kirkuk - (0) 0
Maysan - (3) 2,000,100,000
Muthanna - (0) 0
Sulaymaniyah - (0) 0
Wasit - (5) 18,300,000,000
Justification for changes *
ENG
ARB
Necessity to address an emergency crisis.
Attach Document * (e.g. project document, monitoring reports, and other)
Add Attachment
User Activity Log
Show: Last 5
Field
Original Value
New Value
Save
Save and Close
Cancel

Figure 20: Adjust Funding Requests / Allocations Form

For each modification made to the list of funds, you should provide the comment in the **Justification for Changes** in both English and Arabic languages.

You may additionally attach any related attachments to the defined funds from **Attach Document** section. For details on how to attach documents or other related files, see *IDMS Capital Investments Projects Application User Manual* in REFERENCES.

The **User Activity Log** displays information about the recent changes made to the funds. Identifies the users who performed the changes and the date/time when the modifications were made.

Note: In the right side you may select the number of latest updates to be displayed or you may choose to display whole modification history on the particular record.

6.2.8 Regular Funding Request Approval Procedure

The regular funding request approval diagram is presented in Figure 21.

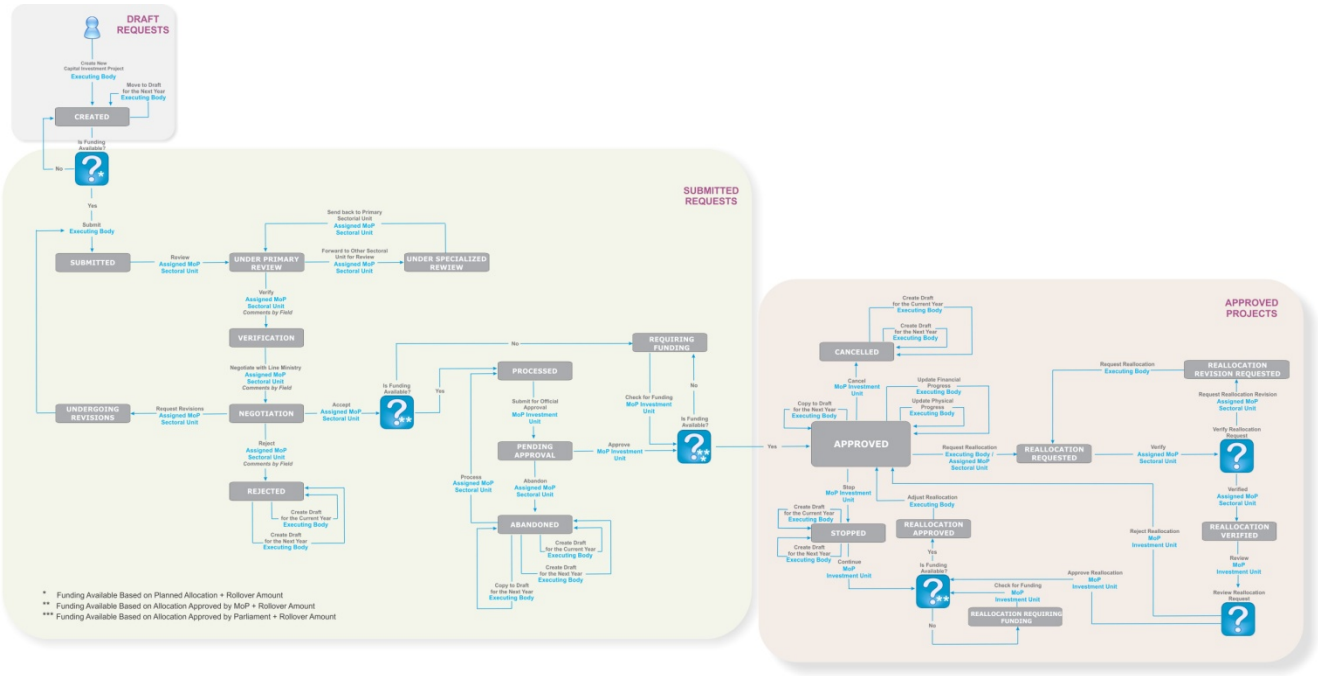

Figure 21: Regular Funding Request Approval Procedure

1. The Executing Body group user creates a funding request. It is saved as a draft in the *My Draft Funding Requests* list of My Workspace module (Figure 14). At this stage, the draft can be moved to the next year. The funding request will appear in the *My Draft Funding Requests* list for the next year and will disappear from the same list for the current year.
   Note: Only Executing Body group users and administrators are able to edit the request drafts at this stage.
2. If Balance (to be Requested) for the current year is a positive value (Planned Allocation + Rollover Amount is greater than 0) and the draft is ready for the submission (i.e. all mandatory information is provided), the **Submit** button located under *My Draft Funding Requests* list becomes active. Executing Body group user submits all selected drafts for further revision. The submitted funding requests will appear in the *Submitted Funding Requests* list (Figure 16).

3. On the next stage, the submitted funding requests are passing through the complicated revision cycle managed by the Assigned Mop Sectoral Unit group users. During multilevel revision (including revisions by one or more Sectoral Units and negotiations with the Line Ministry), the following actions may be taken over the submitted project requests:
   - **Reject** due to negotiation results. For rejected projects, draft projects with all the data of the corresponding project may be created for the current or the next year.
   - **Abandon** due to insufficient funding available or other reasons that may come out during the official revision. For abandoned projects, draft projects with all the data of the corresponding project may be created for the current or the next year, or project may be copied to the next year. Copied project will have the same project code as the original project. However, all other details of the copied project will be individual. Abandoned projects may be processed again, if needed.
   - **Approve** for an implementation. The approved requests are copied into a project and are displayed in the *Approved Projects* list (Figure 17).
     Note: To approve the project, there should be enough *Allocation Approved by Parliament* for the selected Executing Body, as defined in the *Adjust Budget Ceilings* form. For details, see Adjust Budget Ceilings.

4. For approved projects, the following actions are available:
   - **Update Attachments** by providing additional notes/comments about the project and uploading project-related documents.
   - **Update Financial Progress** by indicating the most recent financial data of the project.
   - **Update Physical Progress** by indicating the most recent physical data of the project.
   - **Stop** due to being temporarily non actual. Stopped projects may be continued again, copied to the draft for the current year or for the next year.
   - **Cancel** due to being non actual. Cancelled projects may be continued again, copied to the draft for the current year or for the next year.
   - **Create Draft for the Current / Next Year** for copying the project to the current/next year. The copied project will appear in the *My Drafts Funding Requests* list of the current/next year and will have the same project code as the original project. However, all other details of the copied project will be individual.
   - **Reallocate** if additional funding is required for the project. With this action, the project will enter into reallocation request revision phase. Reallocation is performed to request additional funds from other projects of the selected ministry for the needs of the corresponding funding request.

   For details on each of these actions, and what data is required while taking the action, see *Capital Investment Projects User Manual* in REFERENCES.

5. For projects that have requested reallocation, the Assigned MoP Sectoral Unit user may either verify the reallocation request or send it to the revision. Verified reallocation requests are processed to the next stage where funding for reallocation should be confirmed. If the funding is available, reallocation is approved by MoP Investment Unit user and then project funds breakdowns should be adjusted by Executing Body. When the reallocation is adjusted, the project enters **APPROVED** state again. If there are no

enough funds for emergency project reallocation, MoP Investment Unit user rejects the reallocation request and the projects appears back in the **APPROVED** state.

Note: During reallocation phase, the other project which has provided funds to the project requested reallocation will also change its state. Once reallocation was verified, the project which provided funds should be revised independently for funds breakdown adjustment.

6.2.9 Emergency Funding Request Approval Procedure

Emergency funding requests are those created after the regular requests submission deadline has expired but before the emergency request submission end date. The emergency requests can be submitted even with the negative Balance (to be requested) and require an emergency processing.

The emergency funding request approval diagram is presented in Figure 22.

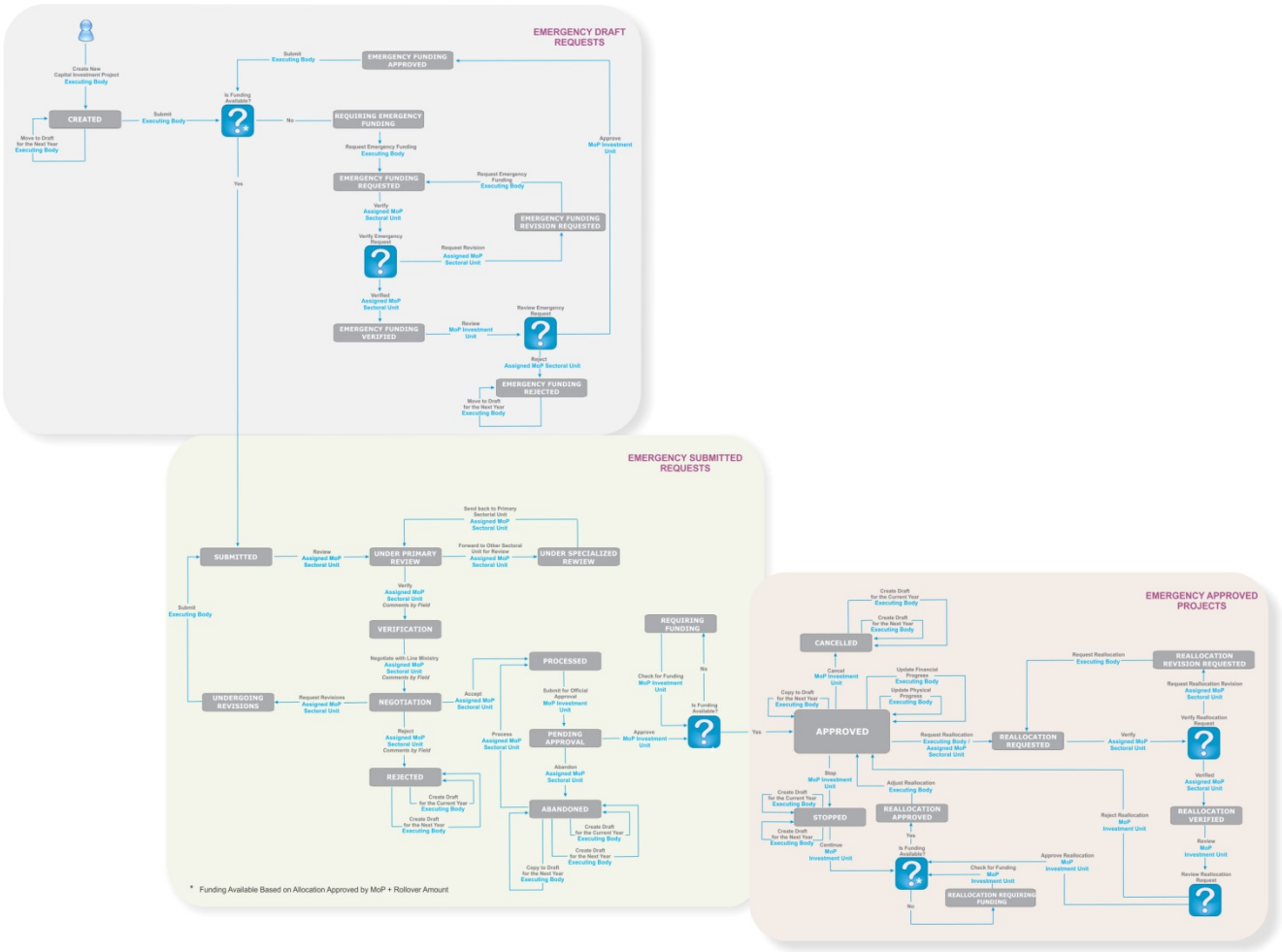

Figure 22: Emergency Funding Request Approval Procedure

1. The Executing Body group user creates an emergency funding request. It is saved as a draft in the *My Draft Funding Requests* list of the *My Workspace* module (Figure 14). At this stage, the draft can be moved to the next year. The emergency funding request will appear in the *My Draft Funding Requests* list for the next year and will disappear from the same list for the current year.

Note: Only Executing Body group users and administrators are able to edit the emergency request drafts at this stage.

2. Even with the negative Balance (to be Requested), Executing Body can submit the emergency funding request. However, before entering the **SUBMITTED** state, emergency request is passing through a funding approval procedure. If there is enough funding available for the emergency request, the request will be submitted, otherwise, if no enough funds are available, the emergency request will remain in the **EMERGENCY FUNDING REJECTED** state. From this state, the emergency request can be moved to the next year. When moved, the emergency funding request will appear in the *My Draft Funding Requests* list for the next year and will disappear from the same list for the current year.
3. On the next stage, the submitted emergency funding requests are passing through the complicated revision cycle managed by the Assigned Mop Sectoral Unit group users. During multilevel revision (including revisions by one or more Sectoral Units and negotiations with the Line Ministry), the following actions may be taken over the submitted project requests:
    - **Reject** due to negotiation results. For rejected projects, draft projects with all the data of the corresponding project may be created for the current or the next year.
    - **Abandon** due to insufficient funding available or other reasons that may come out during the official revision. For abandoned projects, draft projects with all the data of the corresponding project may be created for the current or the next year, or project may be copied to the next year. Copied projects will have the same project code as the original project. However, all other details of the copied project will be individual. Abandoned projects may be processed again, if needed.
    - **Approve** for an implementation. The approved requests are copied into a project and are displayed in the *Approved Projects* list (Figure 17).
4. For approved emergency projects, the following actions are available:
    - **Update Attachments** by providing additional notes/comments about the project and uploading project-related documents.
    - **Update Financial Progress** by indicating the most recent financial data of the project.
    - **Update Physical Progress** by indicating the most recent physical data of the project.
    - **Stop** due to being temporarily non actual. Stopped projects may be continued again, copied to the draft for the current year or for the next year.
    - **Cancel** due to being temporarily non actual. Cancelled projects may be continued again, copied to the draft for the current year or for the next year.
    - **Create Draft for the Current/Next Year** for copying the project to the current/next year. The copied project will appear in the *My Drafts Funding Requests* list of the current/next year and will have the same project code as the original project. However, all other details of the copied project will be individual.
    - **Reallocate** if additional funding is required. With this action, the project will enter into reallocation request revision phase. Reallocation is performed for requesting additional funds from other projects of the selected ministry for the needs of the corresponding funding request.

For details on each of these actions, and what data is required while taking the action, see *Capital Investment Projects User Manual* in REFERENCES.

For emergency projects that have requested reallocation, the Assigned MoP Sectoral Unit user may either verify the reallocation request or send it to the revision. Verified reallocation requests are processed to the next stage where funding for reallocation should be confirmed. If the funding is available, reallocation is approved by MoP Investment Unit user and then project funds breakdowns should be adjusted by Executing Body. When the reallocation is adjusted, the project enters **APPROVED** state again. If there are no enough funds for emergency project reallocation, MoP Investment Unit user rejects the reallocation request and the projects appears back in the **APPROVED** state.

Note: During reallocation phase, the other project which has provided funds to the project requested reallocation will also change its state. Once reallocation was verified, the project which provided funds should be revised independently for funds breakdown adjustment.

6.2.10 Adding a Capital Investment Project Request

To add a new project request, follow the instructions below:

1. Go to the **Capital Investment Projects** tab of the *My Workspace* module.
2. In the *My Draft Funding Requests* section, click the **New Project** button (Figure 14).
3. This will open a form which is described in *IDMS Capital Investments Projects Application User Manual*, see REFERENCES.

6.2.11 Viewing Capital Investment Project Details

Depending on your permissions you may also see or edit project requests added by other users.

To view details of draft and submitted request and the approved projects in the *My Workspace* module, follow the steps below:

1. Go to the **My Workspace** module.
2. Click the **Capital Investment Projects** tab.
3. Expand the **My Draft Funding Requests**, **Submitted Funding Requests**, or **Approved Projects** lists, as needed (Figure 7).
4. Click the request or project **Title** you wish to see the details for. This will open the selected request/project details. For details, see REFERENCES.

6.2.12 Search in Capital Investment Projects of My Workspace

In the *Capital Investments Projects* section of the *My Workspace* module, you are offered to use an advanced search and a quick search features to filter the list of projects/requests with some criteria (Figure 23).

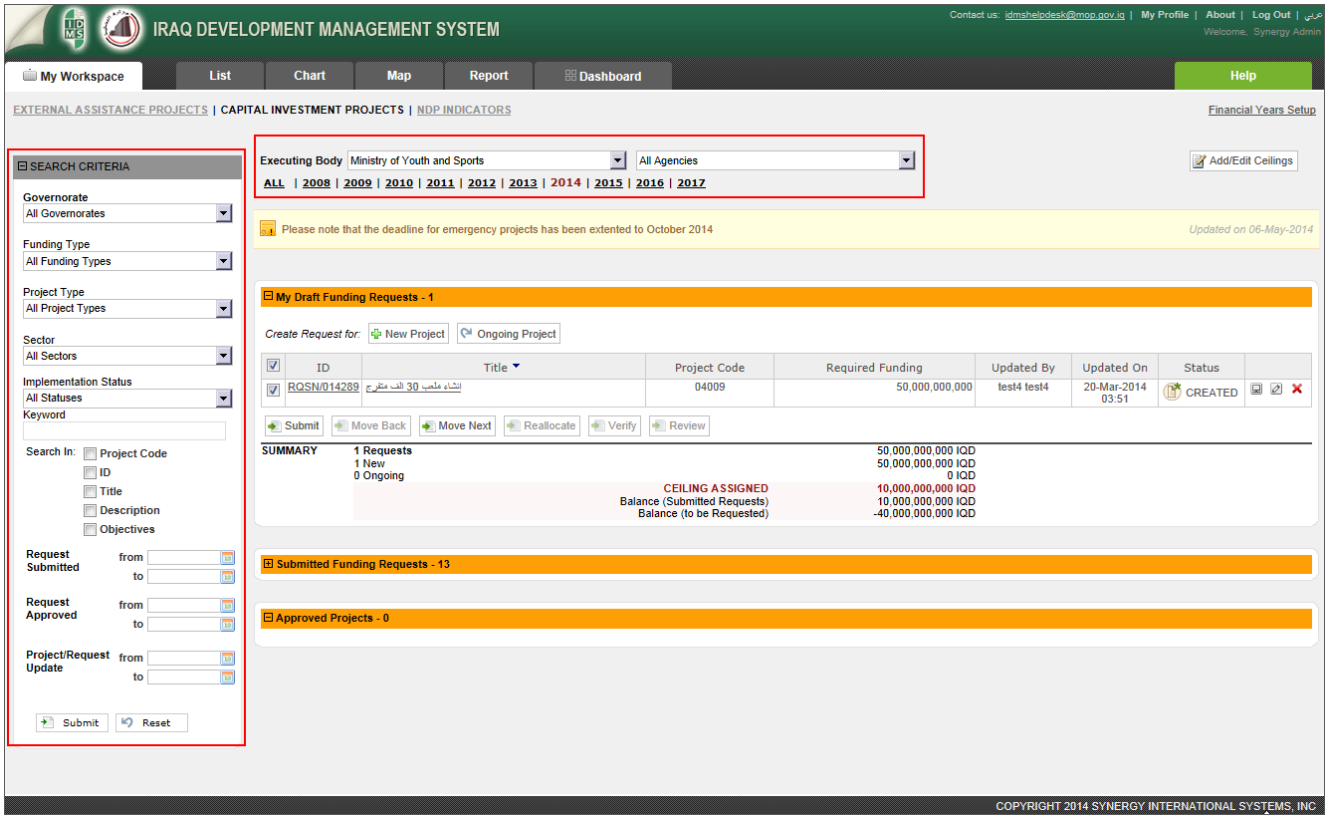

Figure 23: Advanced and Quick Search Options in Capital Investment Projects Section

6.2.12.1 Quick Search

The quick search options are displayed in the My Workspace module right above the list of capital investment projects and requests. You may want to filter the list of projects and requests for the certain **Year**, **Executing Body**, or **Agency**.

Selecting either of the criteria in the quick search toolbar will displayed a filtered list of projects/requests.

Note: You may join both the Quick Search and the Advanced Search criteria together to get the needed filtering.

To reset the yearly filtration and display the list of projects/requests of all years, press the **All** link in the right side of the quick search toolbar.

6.2.12.2 Advanced Search

The advanced search mechanism is used to filter the list of indicators depending on the given one or more advanced search criteria (Figure 23).

The following advanced search criteria are available:

- **Governorate** – filters by the governorate the project is dedicated to.
- **Funding Type** – filters by the funding type assigned to the project.
- **Project Type** – filters by the new or ongoing projects.

- **Sector** - filters by the economy sector the project is dedicated to.
- **Implementation Status** – filters by the status of the project/request.
- **Keyword** –filters the indicators by the keywords. You may want to search the indicated keywords in the **Project Code**, **ID**, **Title**, **Description** and/or **Objectives** fields.
- **Request Submitted** – filters by the date or a range of dates when the request was submitted. Calendar popup is available for these fields, see Figure 13: Calendar.
- **Request Approved** – filters by the date or a range of dates when the request was approved. Calendar popup is available for these fields, see Figure 13: Calendar.
- **Project/Request Updated** – filters by the date or a range of dates when the project or request was updated the last time. Calendar popup is available for these fields, see Figure 13: Calendar.

Once one or more criteria are selected, press the **Submit** button to get the filtered list of projects/requests. If you want to clean the filtering, press the **Reset** button in the searching section of the screen to clear the defined criteria and then press **Submit** to get the whole list of projects/requests.

6.3 NDP Indicators in My Workspace Module

In this page you may see a list of all indicators created from the *My Workspace* module or from the corresponding application by the corresponding user or other users from the same user group. The indicator related information and progress is also outlined in the NDP Indicators table.

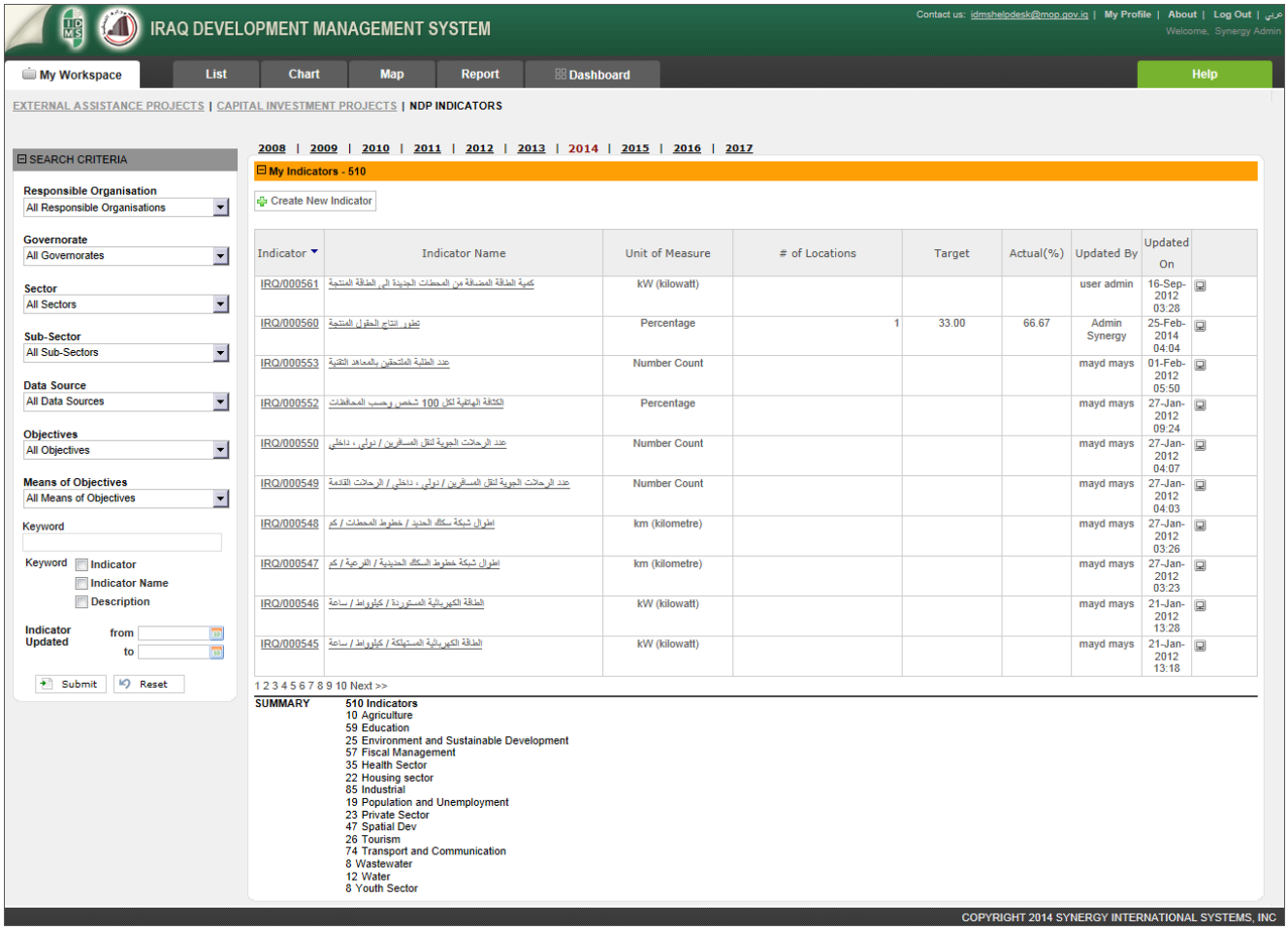
IRAQ DEVELOPMENT MANAGEMENT SYSTEM
Contact us: idmshelpdesk@mop.gov.iq | My Profile | About | Log Out
Welcome, Synergy Admin
My Workspace
List
Chart
Map
Report
Dashboard
Help
EXTERNAL ASSISTANCE PROJECTS | CAPITAL INVESTMENT PROJECTS | NDP INDICATORS
SEARCH CRITERIA
Responsible Organisation
All Responsible Organisations
Governorate
All Governorates
Sector
All Sectors
Sub-Sector
All Sub-Sectors
Data Source
All Data Sources
Objectives
All Objectives
Means of Objectives
All Means of Objectives
Keyword
Indicator
Indicator Name
Description
Indicator Updated
from
to
Submit
Reset
2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017
My Indicators - 510
Create New Indicator
Indicator
Indicator Name
Unit of Measure
# of Locations
Target
Actual(%)
Updated By
Updated On
IRQ/000561 كمية الطاقة المضافة من المحطات الجديدة الى الطاقة المنتجة kW (kilowatt) user admin 16-Sep-2012 03:28
IRQ/000560 تطور انتاج الحقول المنتجة Percentage 1 33.00 66.67 Admin Synergy 25-Feb-2014 04:04
IRQ/000553 عدد الطلبة الملتحقين بالمعاهد التقنية Number Count mayd mays 01-Feb-2012 05:50
IRQ/000552 الكثافة الهاتفية لكل 100 شخص وحسب المحافظات Percentage mayd mays 27-Jan-2012 09:24
IRQ/000550 عدد الرحلات الجوية لنقل المسافرين / دولي ، داخلي Number Count mayd mays 27-Jan-2012 04:07
IRQ/000549 عدد الرحلات الجوية لنقل المسافرين / دولي ، داخلي / الرحلات القادمة Number Count mayd mays 27-Jan-2012 04:03
IRQ/000548 اطوال شبكة سكك الحديد / خطوط المحطات / كم km (kilometre) mayd mays 27-Jan-2012 03:26
IRQ/000547 اطوال شبكة خطوط السكك الحديدية / الفرعية / كم km (kilometre) mayd mays 27-Jan-2012 03:23
IRQ/000546 الطاقة الكهربائية المستوردة / كيلوواط / ساعة kW (kilowatt) mayd mays 21-Jan-2012 13:28
IRQ/000545 الطاقة الكهربائية المستهلكة / كيلوواط / ساعة kW (kilowatt) mayd mays 21-Jan-2012 13:18
1 2 3 4 5 6 7 8 9 10 Next >>
SUMMARY
510 Indicators
10 Agriculture
59 Education
25 Environment and Sustainable Development
57 Fiscal Management
35 Health Sector
22 Housing sector
85 Industrial
19 Population and Unemployment
23 Private Sector
47 Spatial Dev
26 Tourism
74 Transport and Communication
8 Wastewater
12 Water
8 Youth Sector
COPYRIGHT 2014 SYNERGY INTERNATIONAL SYSTEMS, INC

Figure 24: NDP Indicators Section in My Workspace

In this section, the NDP indicator may be created; details of the existing indicators can be viewed and edited.

The information displayed in the *My Workspace* module for each indicator includes the following information:

- **Indicator** – the code of the indicator.
- **Indicator Name** – the title of the indicator.
- **Unit of Measure –** the unit of measure of the indicator**.**
- **# of Locations** – the number of locations covered by the indicator.
- **Target** – the target value of the indicator.
- **Actual (%) –** actual progress of the indicator, in percents.
- **Updated By** – last update author.
- **Updated On** – last update date.
- **Actions** – you may view ( ), edit ( ) and delete ( ) the indicator.

The **NDP Indicators** section in the *My Workspace* module is enriched with an advanced search mechanism. For details, see chapter Search in NDP Indicators of My Workspace.

6.3.1 Adding a New Indicator

To add a new NDP indicator from the *My Workspace* module, follow the instructions below:

1. Go to the **NDP Indicators** tab of the *My Workspace* module.
2. Click the **Create New Indicator** button (Figure 25).

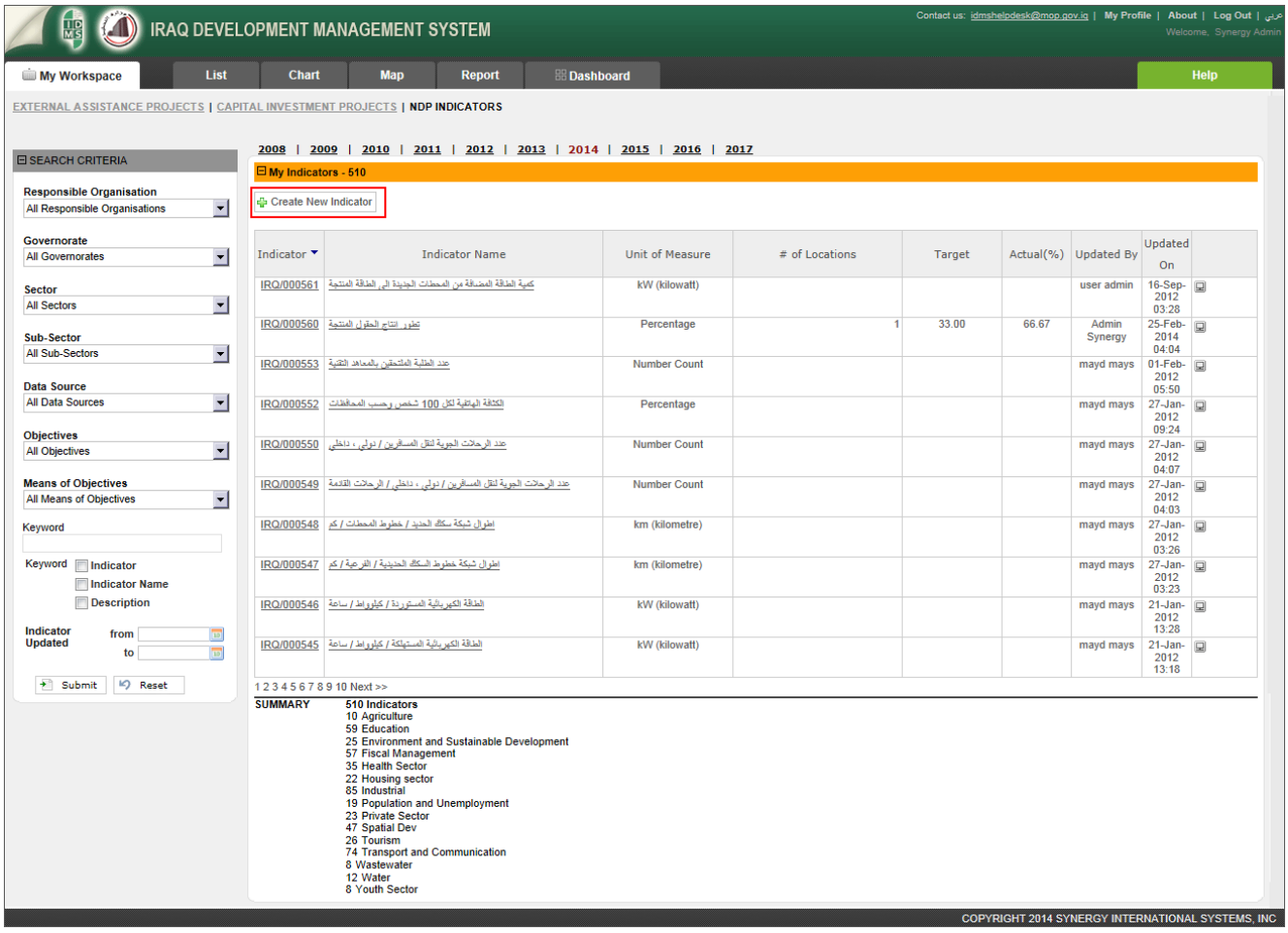
IRAQ DEVELOPMENT MANAGEMENT SYSTEM
Contact us: idmshelpdesk@mop.gov.iq | My Profile | About | Log Out
Welcome, Synergy Admin
My Workspace
List
Chart
Map
Report
Dashboard
Help
EXTERNAL ASSISTANCE PROJECTS | CAPITAL INVESTMENT PROJECTS | NDP INDICATORS
SEARCH CRITERIA
Responsible Organisation
All Responsible Organisations
Governorate
All Governorates
Sector
All Sectors
Sub-Sector
All Sub-Sectors
Data Source
All Data Sources
Objectives
All Objectives
Means of Objectives
All Means of Objectives
Keyword
Indicator
Indicator Name
Description
Indicator Updated
from
to
Submit
Reset
2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017
My Indicators - 510
Create New Indicator
Indicator
Indicator Name
Unit of Measure
# of Locations
Target
Actual(%)
Updated By
Updated On
IRQ/000561 كمية الطاقة المضافة من المحطات الجديدة الى الطاقة المنتجة kW (kilowatt) user admin 16-Sep-2012 03:28
IRQ/000560 تطور انتاج الحقول المنتجة Percentage 1 33.00 66.67 Admin Synergy 25-Feb-2014 04:04
IRQ/000553 عدد الطلبة الملتحقين بالمعاهد التقنية Number Count mayd mays 01-Feb-2012 05:50
IRQ/000552 الكثافة الهاتفية لكل 100 شخص وحسب المحافظات Percentage mayd mays 27-Jan-2012 09:24
IRQ/000550 عدد الرحلات الجوية لنقل المسافرين / دولي ، داخلي Number Count mayd mays 27-Jan-2012 04:07
IRQ/000549 عدد الرحلات الجوية لنقل المسافرين / دولي ، داخلي / الرحلات القادمة Number Count mayd mays 27-Jan-2012 04:03
IRQ/000548 اطوال شبكة سكك الحديد / خطوط المحطات / كم km (kilometre) mayd mays 27-Jan-2012 03:26
IRQ/000547 اطوال شبكة خطوط السكك الحديدية / الفرعية / كم km (kilometre) mayd mays 27-Jan-2012 03:23
IRQ/000546 الطاقة الكهربائية المستوردة / كيلوواط / ساعة kW (kilowatt) mayd mays 21-Jan-2012 13:28
IRQ/000545 الطاقة الكهربائية المستهلكة / كيلوواط / ساعة kW (kilowatt) mayd mays 21-Jan-2012 13:18
1 2 3 4 5 6 7 8 9 10 Next >>
SUMMARY
510 Indicators
10 Agriculture
59 Education
25 Environment and Sustainable Development
57 Fiscal Management
35 Health Sector
22 Housing sector
85 Industrial
19 Population and Unemployment
23 Private Sector
47 Spatial Dev
26 Tourism
74 Transport and Communication
8 Wastewater
12 Water
8 Youth Sector
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Figure 25: Create New Indicator button in NDP Indicators Section

This will open an *Add Indicator* form which is described in *IDMS NDP Indicators User Manual*, see REFERENCES.

6.3.2 Viewing Indicator Details

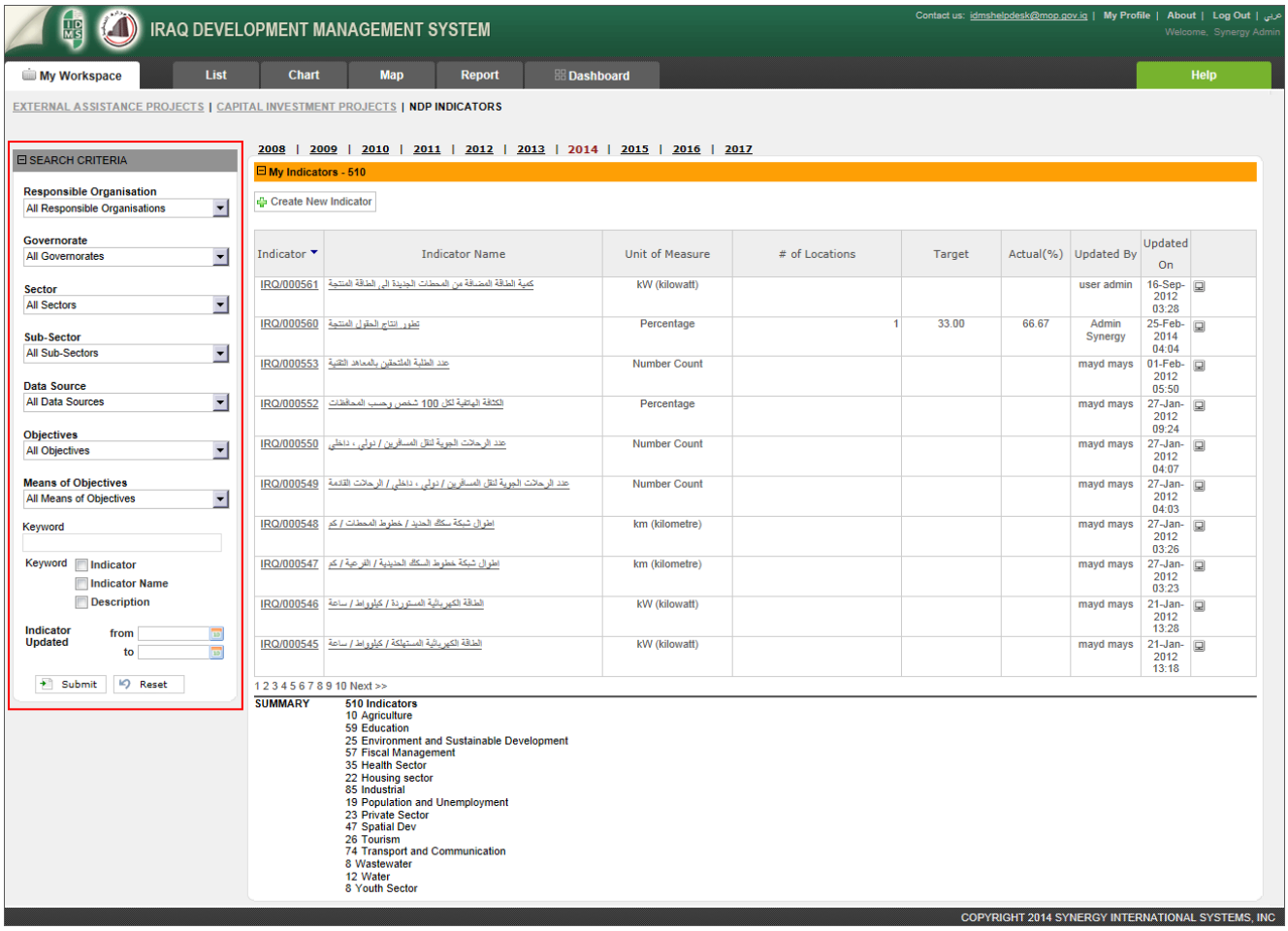
Depending on your permissions you may also see or edit NDP indicators added by other users.

To view details of drafts and submitted projects in the *My Workspace* module, follow the steps below:

1. Go to the **My Workspace** module.
2. Click the **NDP Indicator** tab.
3. Click the indicator you wish to see the details for. This will open indicator details. For details, see REFERENCES.

6.3.3 Search in NDP Indicators of My Workspace

The advanced search mechanism is used to filter the list of indicators depending on the given one or more search criteria (Figure 26).


IRAQ DEVELOPMENT MANAGEMENT SYSTEM
Contact us: idmshelpdesk@mop.gov.iq | My Profile | About | Log Out
Welcome, Synergy Admin
My Workspace
List
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Map
Report
Dashboard
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EXTERNAL ASSISTANCE PROJECTS | CAPITAL INVESTMENT PROJECTS | NDP INDICATORS
SEARCH CRITERIA
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All Responsible Organisations
Governorate
All Governorates
Sector
All Sectors
Sub-Sector
All Sub-Sectors
Data Source
All Data Sources
Objectives
All Objectives
Means of Objectives
All Means of Objectives
Keyword
Indicator
Indicator Name
Description
Indicator Updated
from
to
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2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017
My Indicators - 510
Create New Indicator
Indicator
Indicator Name
Unit of Measure
# of Locations
Target
Actual(%)
Updated By
Updated On
IRQ/000561 كمية الطاقة المضافة من المحطات الجديدة الى الطاقة المنتجة kW (kilowatt) user admin 16-Sep-2012 03:28
IRQ/000560 تطور انتاج الحقول المنتجة Percentage 1 33.00 66.67 Admin Synergy 25-Feb-2014 04:04
IRQ/000553 عدد الطلبة الملتحقين بالمعاهد التقنية Number Count mayd mays 01-Feb-2012 05:50
IRQ/000552 الكثافة الهاتفية لكل 100 شخص وحسب المحافظات Percentage mayd mays 27-Jan-2012 09:24
IRQ/000550 عدد الرحلات الجوية لنقل المسافرين / دولي ، داخلي Number Count mayd mays 27-Jan-2012 04:07
IRQ/000549 عدد الرحلات الجوية لنقل المسافرين / دولي ، داخلي / الرحلات القادمة Number Count mayd mays 27-Jan-2012 04:03
IRQ/000548 اطوال شبكة سكك الحديد / خطوط المحطات / كم km (kilometre) mayd mays 27-Jan-2012 03:26
IRQ/000547 اطوال شبكة خطوط السكك الحديدية / الفرعية / كم km (kilometre) mayd mays 27-Jan-2012 03:23
IRQ/000546 الطاقة الكهربائية المستوردة / كيلوواط / ساعة kW (kilowatt) mayd mays 21-Jan-2012 13:28
IRQ/000545 الطاقة الكهربائية المستهلكة / كيلوواط / ساعة kW (kilowatt) mayd mays 21-Jan-2012 13:18
1 2 3 4 5 6 7 8 9 10 Next >>
SUMMARY 510 Indicators
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57 Fiscal Management
35 Health Sector
22 Housing sector
85 Industrial
19 Population and Unemployment
23 Private Sector
47 Spatial Dev
26 Tourism
74 Transport and Communication
8 Wastewater
12 Water
8 Youth Sector
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Figure 26: Advanced Search in NDP Indicators Section

The following search criteria are available:

- **Responsible Organisation** – filters by the organisation responsible for the indicator.
- **Governorate** – filters by the governorate the indicator is dedicated to.
- **Sector** - filters by the economy sector the indicator is dedicated to.
- **Sub-Sector –** filters by the sub-sector the indicator is dedicated to.
- **Data Source** –filters by the data source information for the indicator.
- **Objectives –** filters by the objective set for the indicator.
- **Means of Objectives** – filters by the means of objectives for the indicator.
- **Keyword** – filters the indicators by the keywords. You may want to search the indicated keywords in the **ID**, **Title**, and/or **Description** fields.
- **Indicator Updated** – filters by the date or a range of dates when indicators were updated the last time. A calendar popup is available for these fields, see Figure 13: Calendar.

Once one or more criteria are selected, press the **Submit** button to get the filtered list of indicators. If you want to clean the filtering, press the **Reset** button in the searching section of the screen to clear the defined criteria and then press **Submit** to get the whole list of indicators.

7. LIST MODULE

In the *List* module (Figure 27) of the *IDMS* application, you can create and execute ad-hoc queries on projects data and acquire results in the form of a list.

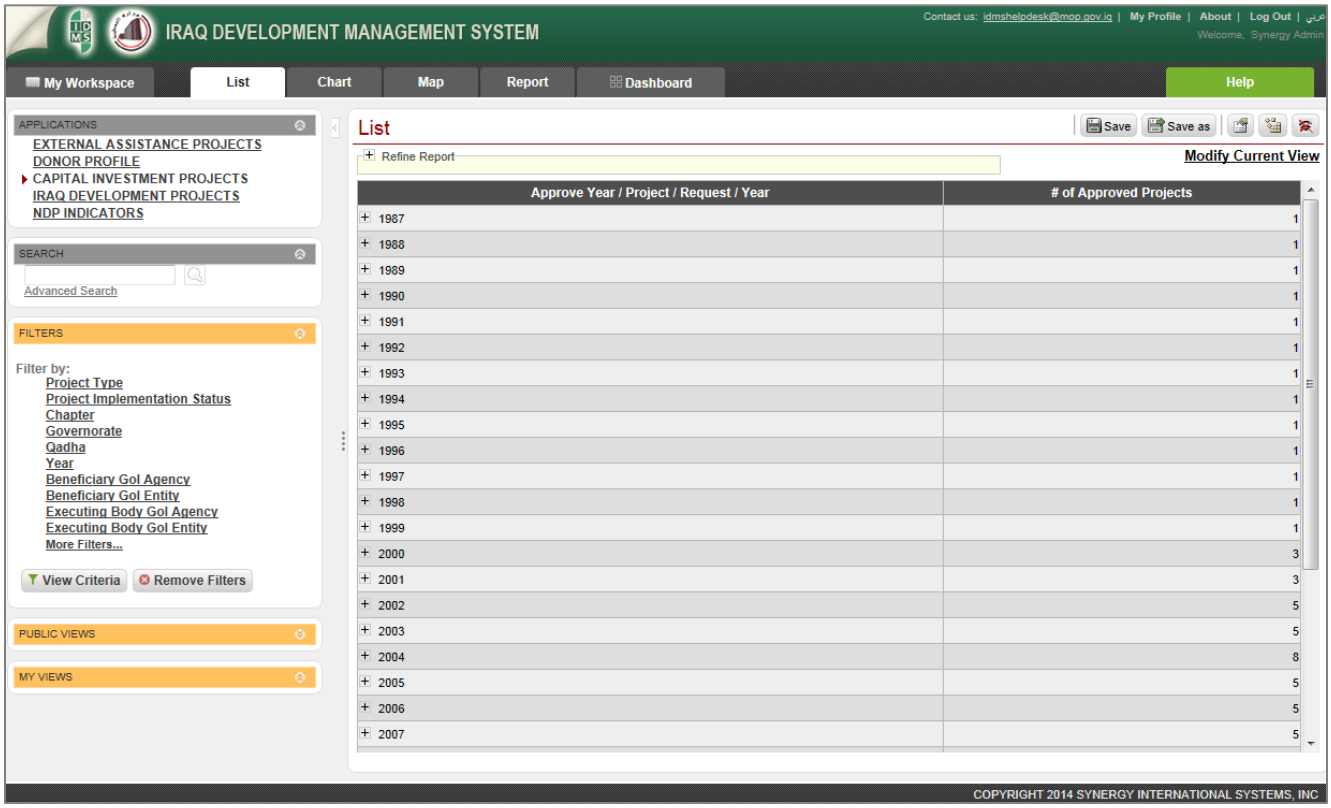


Figure 27: IDMS Application List Module

7.1 Accessing the List Module

A list consists of at least one group and one column, but the actual quantity of groups and columns is defined by the user's choice of view. Please see Modifying the Current View for more details on how to define groups / columns of a list.

In order to access the *List* module, click the **List** tab. You will be navigated to the *List* module. In this module, you can view data organised according to the selected groupings and columns, modify the currently used list, save it as a pre-defined report, include it under a definite group, etc.

7.2 Expanding the List Item

It is possible to expand the list item level to view the information of the sub-level(s). In order to expand the list item level, click the '+' sign next to the name of the list item. This will expand the list item group level displaying the first sub-level (Figure 28). This can further be expanded unless there are no more sub-levels to be displayed.

Note: You can expand only one group level at a time. If you expand the group level of another list item, the previously expanded group level will get collapsed.

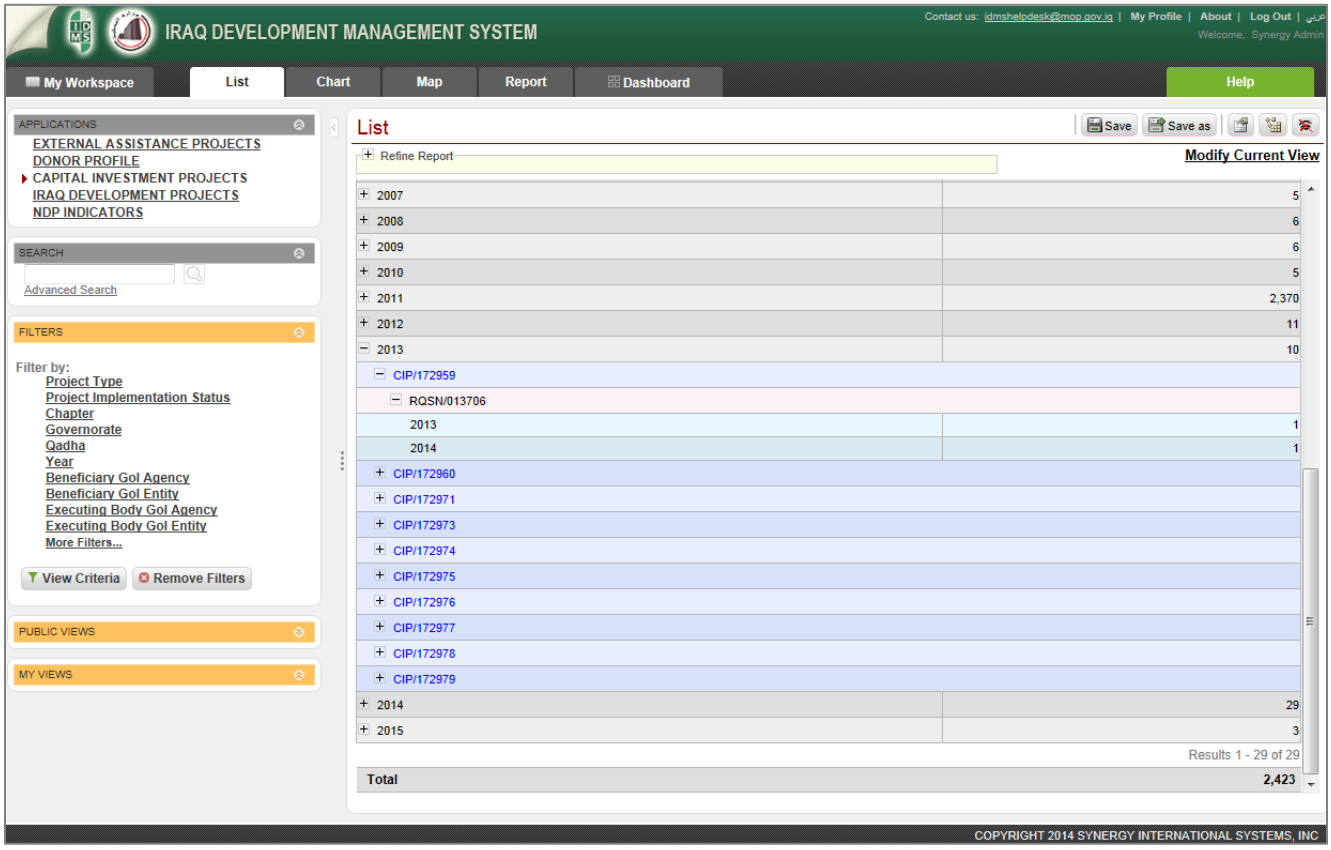


Figure 28: Expanding the List Item Level

7.3 Sorting List Items

You can sort the list view by column by clicking on the name of the column. This will sort the list alphabetically or numerically depending on the type of data entered into that column. Clicking the upward- or downward-pointing arrow that appears on the column can reverse the order of the list.

7.4 Browsing among List Items

You can browse among the list items by clicking on the number link of the page to navigate to. The **Previous** and **Next** buttons can be used to move to the required page.

7.5 Refining the Report

In the *List* module, you can refine the list view displayed on the screen to focus on specific data. Options for refining a report are listed in the *Refine Report* area (Figure 29). The criteria in the *Refine Report* section are dependent on the groups in the user defined current view. See Modifying the Current View.

For example, if you have selected Approve Year → Project hierarchy as the groupings for the view, you will be able to filter the data by Approve Year. In the same way, if you have indicated Approve Year → Project → Year hierarchy as the groupings for the view, you will be able to filter the data by an Approve Year and Year.

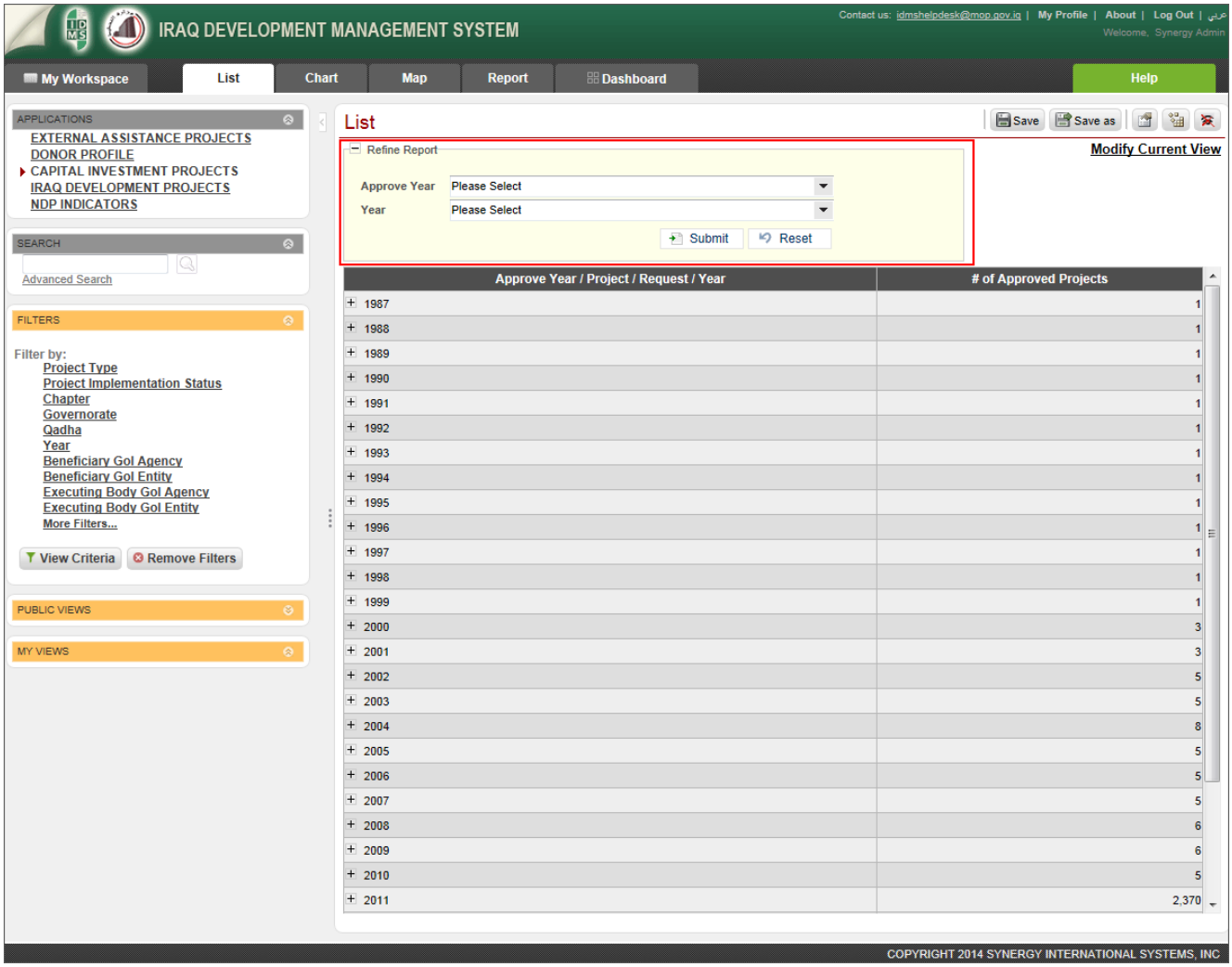


Figure 29: Refine Report Area

Once you select the appropriate category to refine the list view report by and click the **Submit** button, the report will be regenerated with only the selected category data included in it (Figure 30).

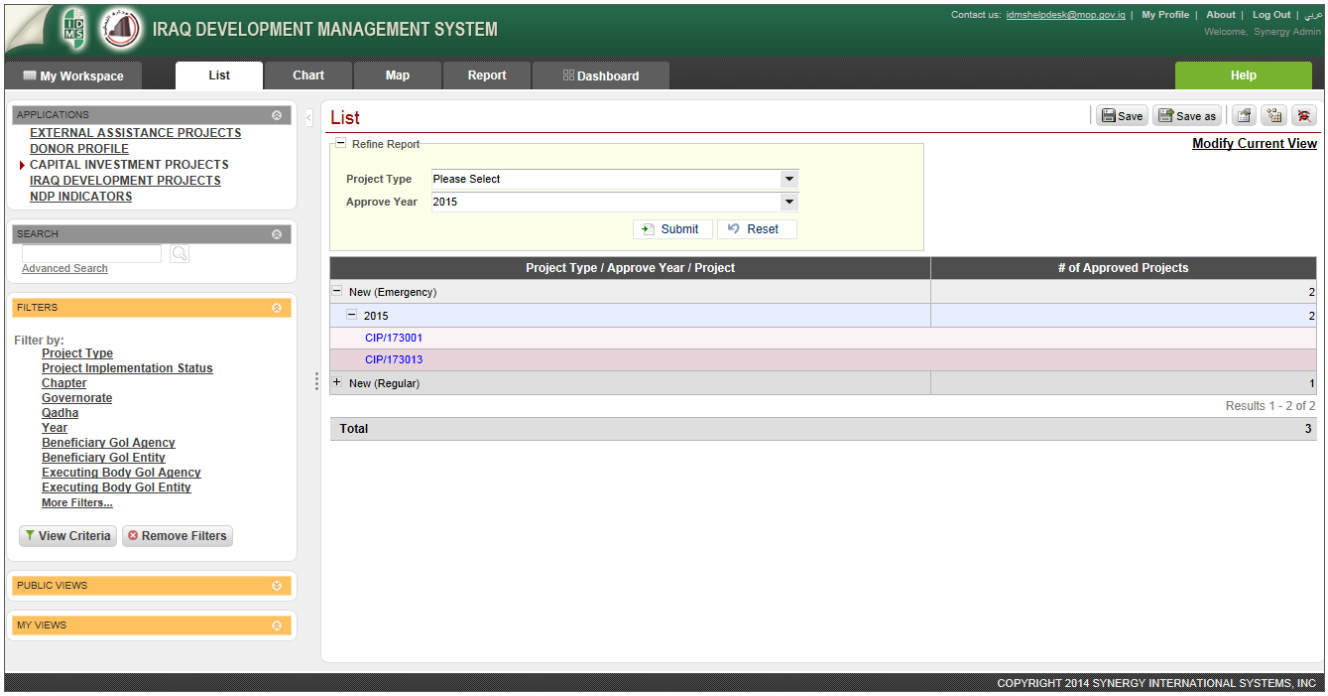


Figure 30: Refining a Report

7.6 Hiding / Showing Images in the List

In order to make the list load quicker, you can choose to hide the images which are displayed in the list. These images can be donor flags, sector icons, etc.

To show the images in the list, click the button located at the top of the screen (Figure 31). All the images in the screen will display.

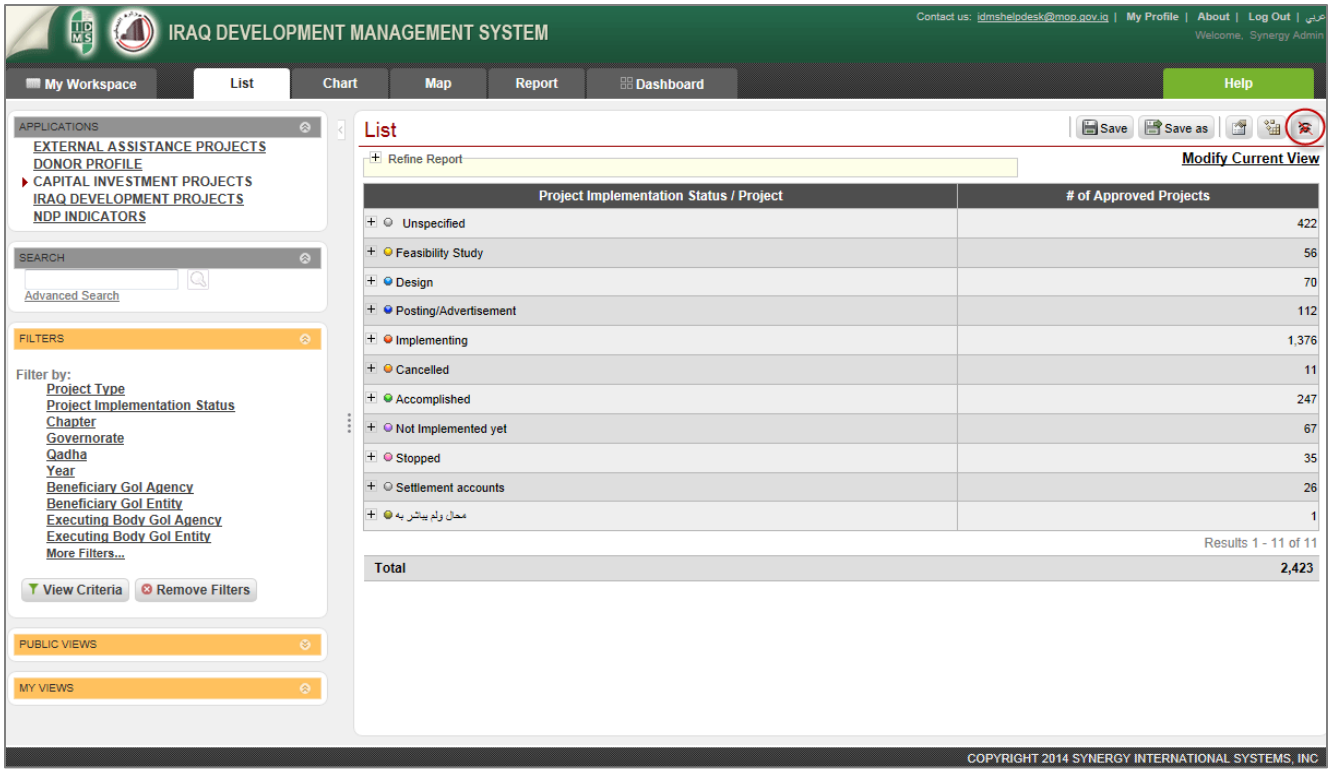


Figure 31: Showing Images in the List

Note: Clicking the button will hide the images.

7.7 Modifying the Current View

It is possible to modify the list that is currently displayed in the List module. You can add new groupings to it or remove the selected ones, (un-) select columns, re-order them, etc. The steps described below provide for the necessary instructions for modifying the current view.

1. Click the **Modify Current View** link at the top right corner of the *List* screen. A *Modify Current View* window (Figure 32) will appear presenting the administrator with the groupings/columns selected and available for the list view.
2. In the *Groupings* section, add / re-order / remove groups.
3. In the *Columns* section, add / re-order / remove columns.
4. In the *Cross Tab Groupings* section, define add / re-order / remove column groupings for the view.
5. Set the view as default, if necessary. Please, note that the view can appear as default for a current user or for unregistered public users.
6. After finishing making changes in the view, click the **OK** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

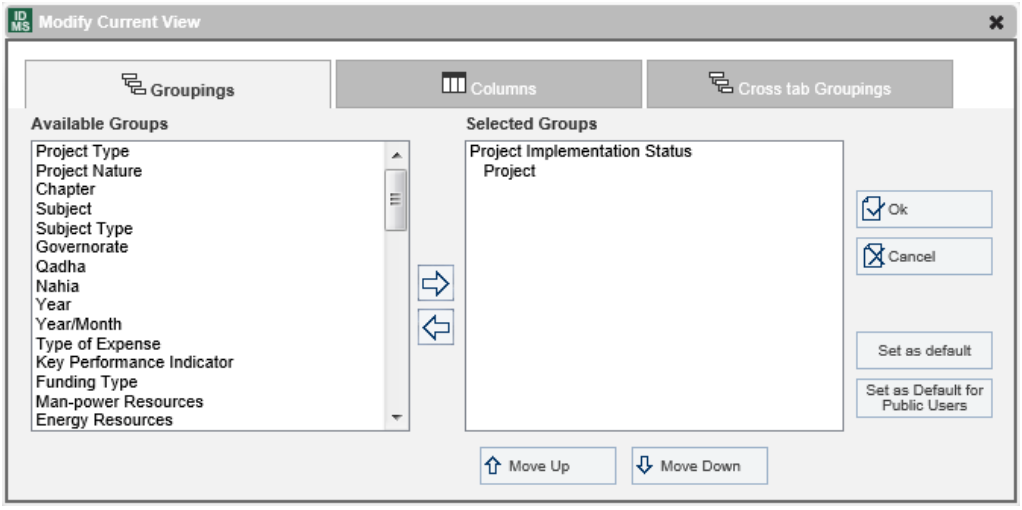


Figure 32: Modifying the Current View

7.7.1 Adding List Groups / Columns / Column Groupings

In order to add a group / column / column grouping to the list, follow the steps below:

1. In the *Available Groups / Columns* panel, select the group / column / column grouping to be added to the list.
   Note: It is possible to select several groups / columns by means of the **Shift** or **Ctrl** keyboard buttons.
2. Click the **(Select)** button. The selected group(s) / column(s) will appear in the *Selected Groups / Columns* panel.

7.7.2 Re-ordering Groups / Columns / Column Groupings

In order to re-order the selected groups / columns / column groupings, follow the steps below:

1. Select the group / column / column grouping that needs to be re-ordered in the *Selected Groups / Columns* panel.
2. Click the **Move Up / Move Down** button.

7.7.3 Removing Groups / Columns / Column Groupings

In order to remove the selected groups / columns / column groupings from the list, follow the steps below:

1. In the *Selected Groups / Columns* panel, select the group / column / column grouping that needs to be removed from the list.
2. Click the **(Unselect)** button. The selected group(s) / column(s) / column grouping(s) will be removed from the *Selected Groups / Columns* panel.

7.7.4 Setting a View as Default

After making changes in the view currently displayed in the *List* module, you can set the newly created view as default. This means that the new view will be displayed when the user accesses the *List* module.

In order to set a view as default, follow the steps below:

1. Make the necessary changes in the current view as described in the sections above.
2. After finishing, click the **Set as Default** button in the *Modify Current View* window. Please note that the view will be set as default only for the current user.

Note: Clicking the **Set as Default for Public Users** button will display the view to those who access the application as unregistered public user.

7.8 Sample Views

In the following chapters, you can see several samples on list reports.

7.8.1 Sample View 1

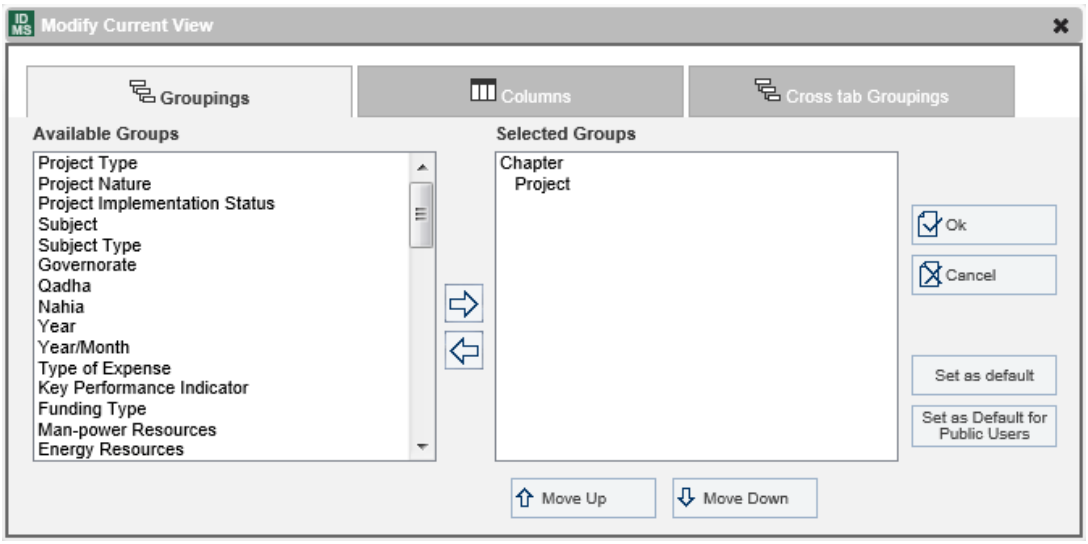


Figure 33: Defining List View Groupings for Sample View 1

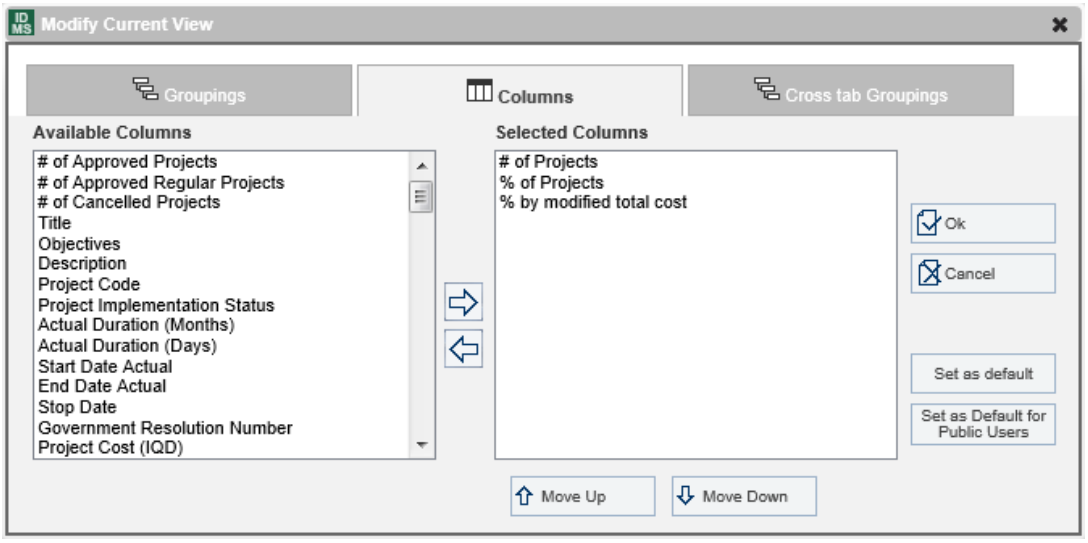


Figure 34: Defining List View Columns for Sample View 1

If you have indicated **Chapter** / **Project** hierarchy as a grouping (Figure 33) and **# of Projects** / **% of Projects** / **% by modified total cost** as columns (Figure 34), the following list view will appear (Figure 35):

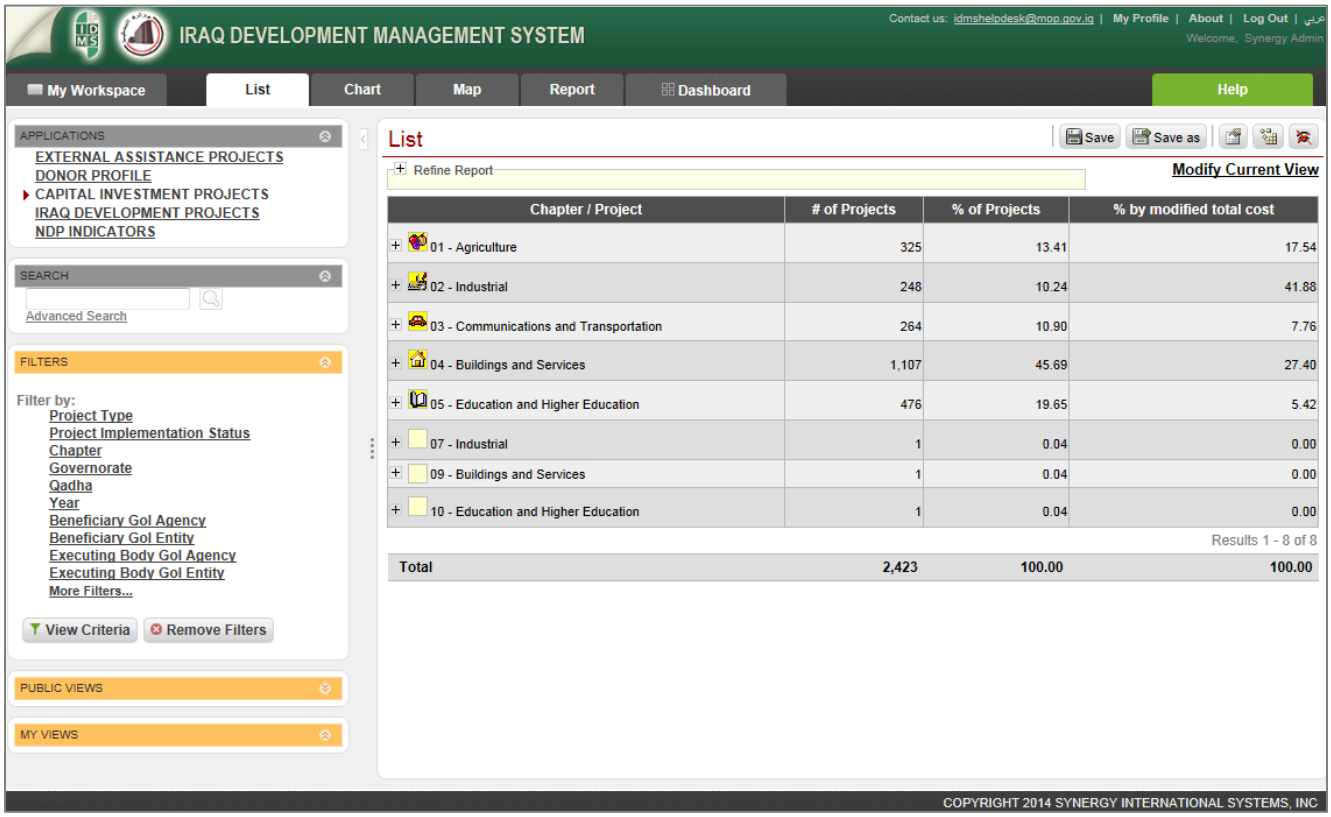


Figure 35: Sample View 1

7.8.2 Sample View 2

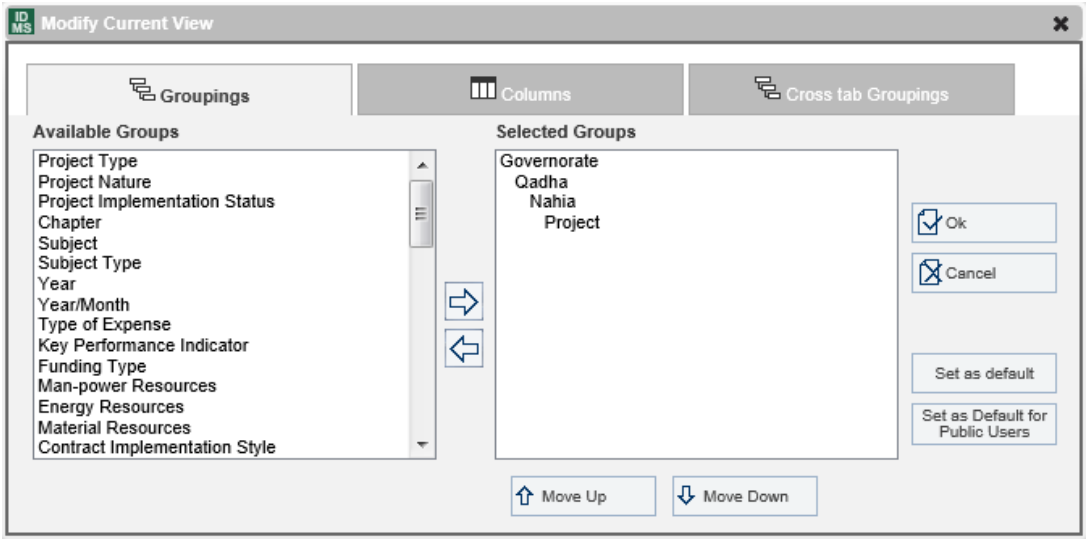


Figure 36: Defining List View Groupings for Sample View 2

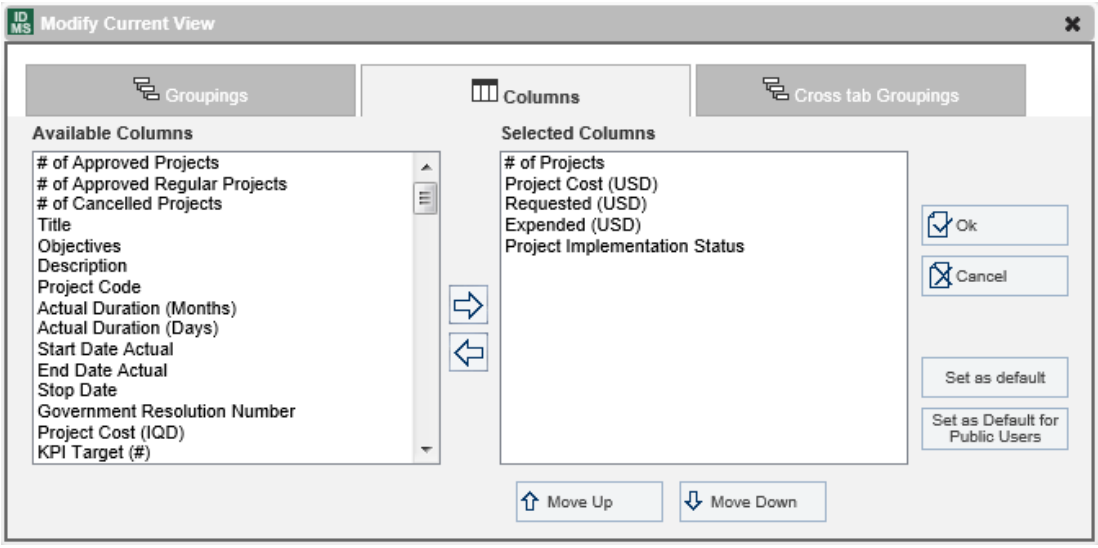


Figure 37: Defining List View Columns for Sample View 2

If you have indicated **Governorate** / **Qadha** / **Nahia** / **Project** hierarchy as a grouping (Figure 36) and **# of Projects** / **Project Cost (USD)** / **Requested (USD)** / **Expended (USD)** / **Project Implementation Status** as columns (Figure 37), the following list view will appear (Figure 38):

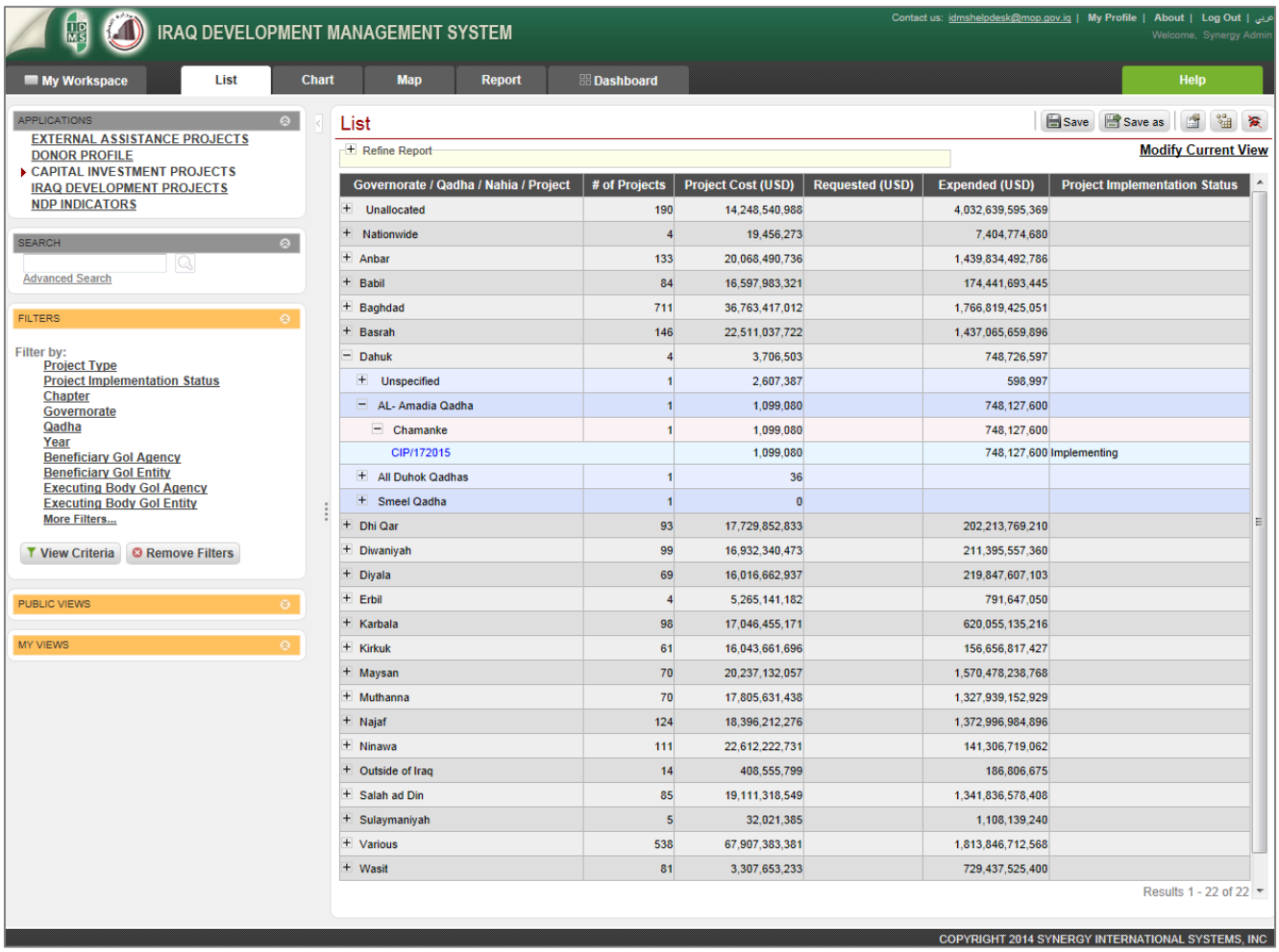


Figure 38: Sample View 2

8. CHART MODULE

The *IDMS* application is equipped with a powerful chart designer that empowers you with all necessary tools to create charts for professionally looking presentations and reports. A user-friendly interface, great number of visual effects and pre-defined chart types, flexible chart components selection, and on-screen real-time chart visualization make using the chart designer an easy and delightful experience.

8.1 Key Features

You can make use of the following key features of the *Chart* tool in *IDMS*:

- ✓ Rich user interface that supports movable windows for arranging the screen as desired.
- ✓ The ability to resize the charts directly in the workspace.
- ✓ The ability to show or hide the data labels and legends.
- ✓ The ability to customize the coloring, or choose pattern-filled charts for black and white printing.

8.2 Accessing the Chart Module

As it has been stated above, the system provides for the opportunity to present data in the form of different charts. In order to access the *Chart* module of the system, click the **Chart** tab. The *Chart* module appears where a pre-defined chart is displayed.

8.3 Main Screen and Its Components

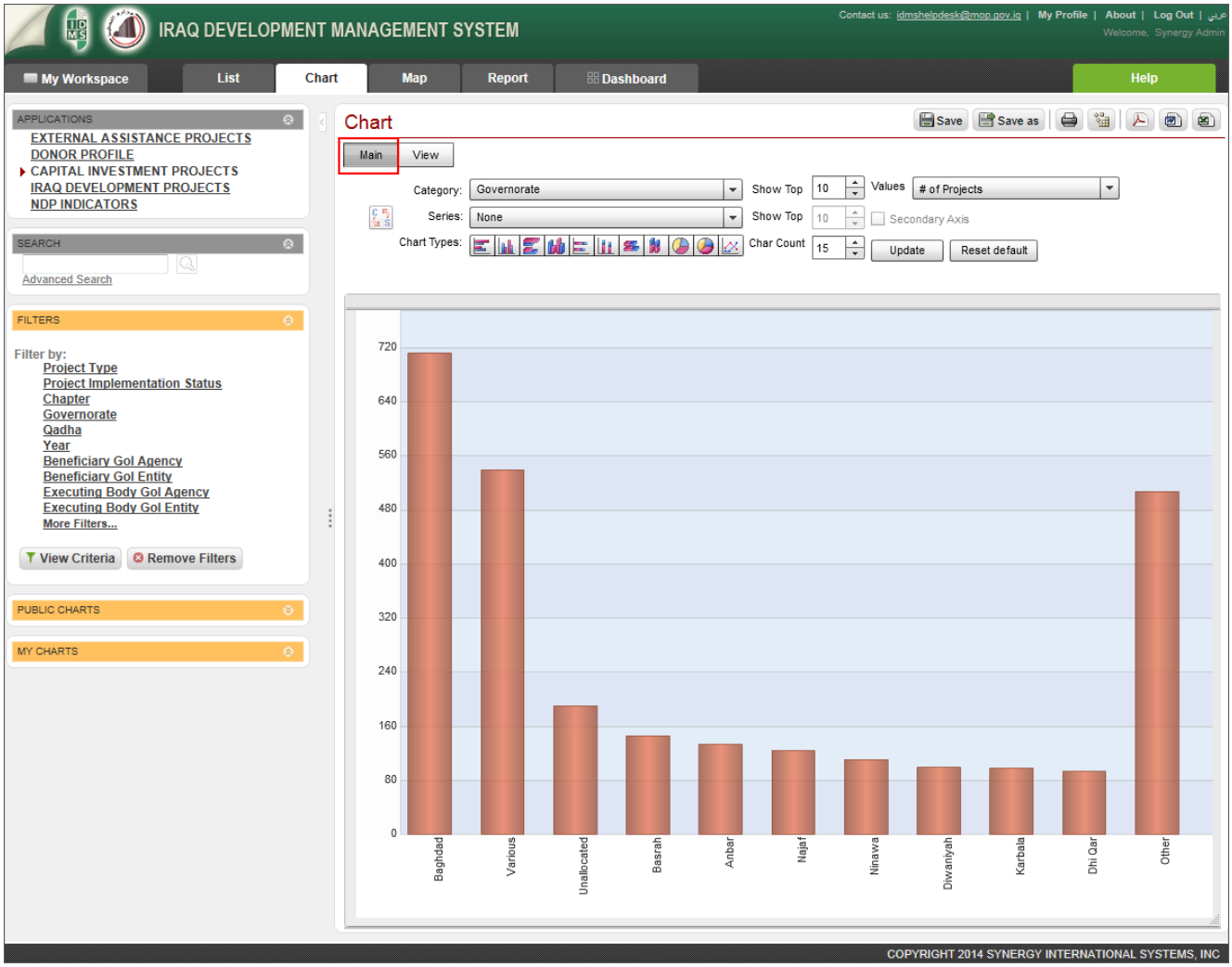


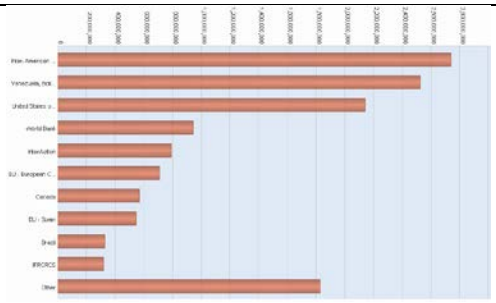
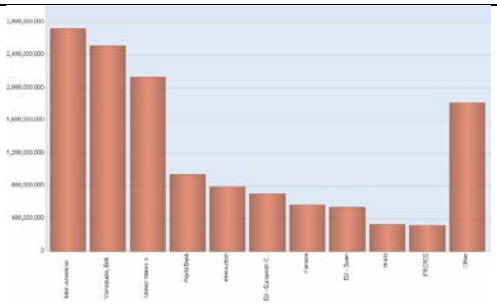
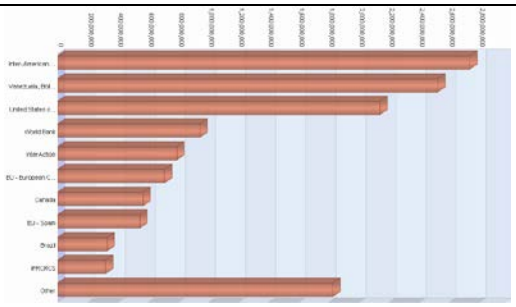
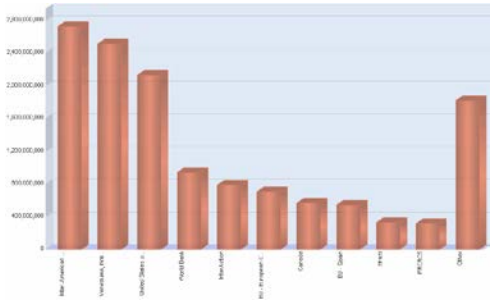
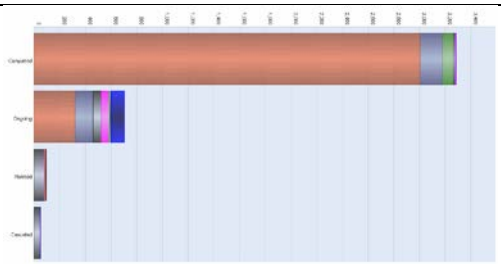
Figure 39: Main Screen of the Chart Module

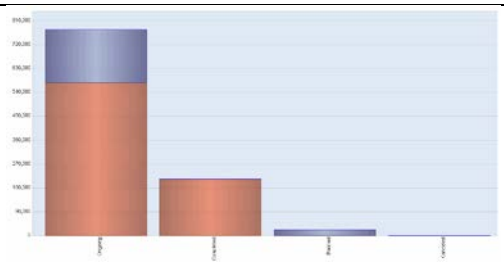
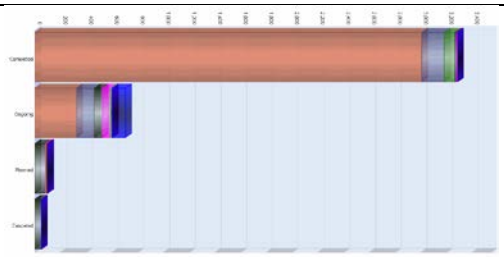
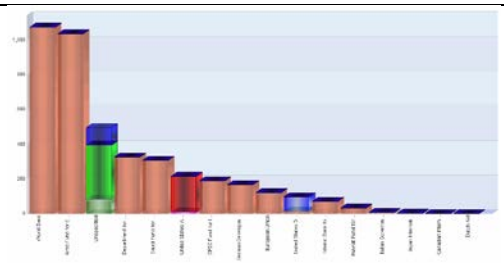
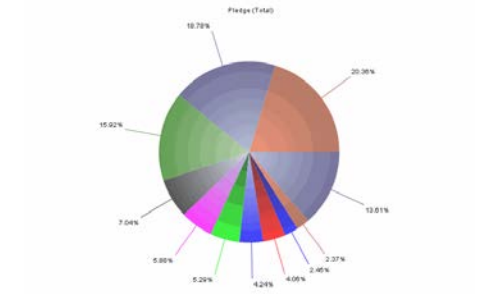
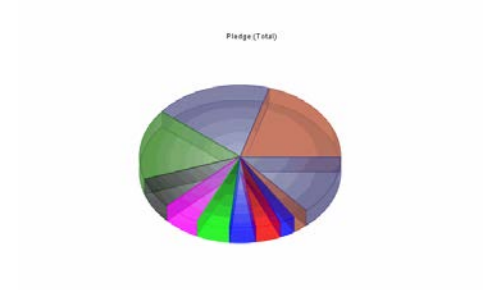
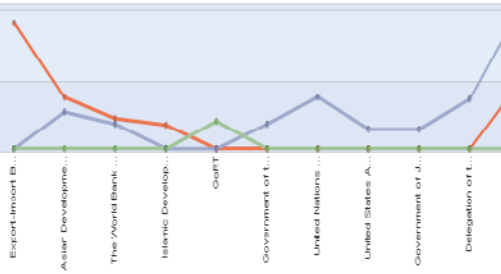
1. **Category** - allows selecting one of the options provided in the **Category** drop-down menu located at the top of the *Chart* window. The selected category will define one of the chart axes. Selection of a category for the chart report is required.

2. **Series** - allows selecting one of the options provided in the **Series** drop-down menu located at the top of the *Chart* window. The selected series will define the chart legend. Selection of a series for the chart report is optional.

   Note: Clicking the **(Swap)** button allows switching places of category and series selections.

3. **Chart Types** - allows defining the chart type. The following options are available:

Chart Type	Example
1. Bar	
2. Column	
3. 3D Bar	
4. 3D Column	
5. Stacked Bar	

6. Stacked Column	
7. Stacked 3D Bar	
8. Stacked 3D Column	
9. Pie	
10. 3D Pie	
11. Line	

4. **Show Top <Number>** - indicates the maximal number of category items to be displayed in the chart.

5. **Show Top <Number> on Secondary Axis** - indicates the maximal number of series items that should be displayed on the secondary axis in the chart. Becomes available only if a Series is selected. This option is disabled if you have selected the pie or line chart types.

6. **Char Count** - limits the number of characters to be used to display the category item names to the value set in this field.

7. **Values** - allows selecting a value from the list that will define the main chart criteria.

8. **Update** - loads the latest data from the database and displays them on the chart.
9. **Reset Default** – loads the default chart built according to the default chart category and chart type.

10. **Workspace** - the main working area in the *Chart* module where the chart designed is displayed.

8.4 View Screen and Its Components

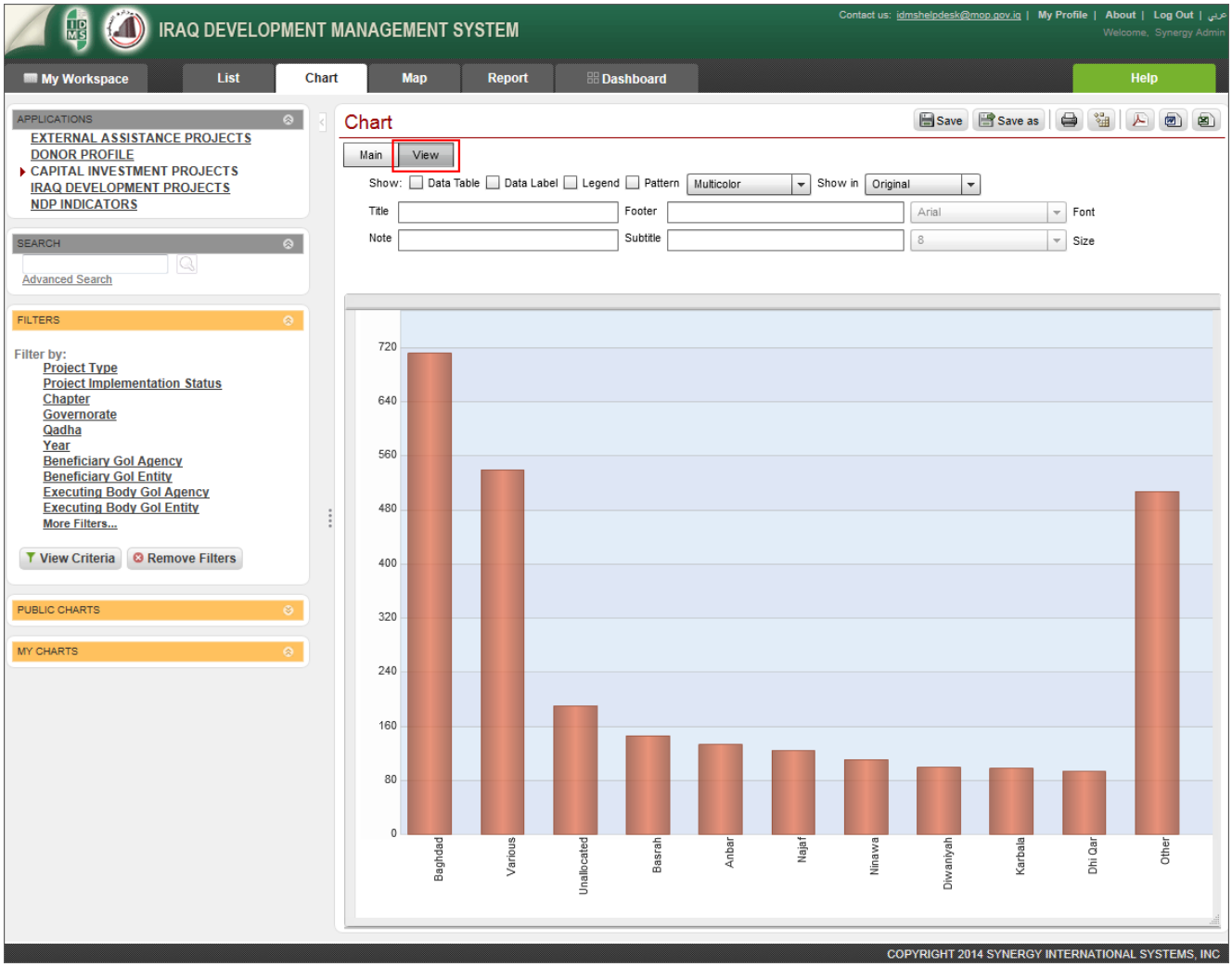


Figure 40: View Screen of the Chart Module

1. **Show -** allows selecting one or several of the following options:
   - ***Data Table* -** presents the information contained in the chart in a grid or matrix.
   - ***Data Label* -** shows the actual values of each chart cell. This option is disabled if you have selected the pie or line chart types.
   - ***Legend* -** explains the categories and data series displayed on the chart.
   - ***Pattern* -** allows choosing a pattern-filled chart for black and white printing.
   - ***Coloring Option* -** allows defining whether the chart should be displayed in multiple colors or in one of the colors available.
   - ***Show In* –** allows defining how the numeric values will be displayed on the chart. To avoid large number occupying too much space, you can choose to view the numbers in thousands / millions / billions.

2. **Title** – a text box to enter the chart report title.

3. **Note -** a text box to enter additional information about the chart report.

4. **Footer -** a text box to insert a portion of text that will appear in the bottom area of the chart report.

5. **Subtitle -** a text box to enter a subtitle for the chart report.

6. **Font -** allows selecting the font the chart report title/subtitle/footer/note will appear in.

7. **Size -** allows selecting the font size the chart report title/subtitle/footer/note will appear in.

8. **Workspace -** the main working area in the *Chart* module where the chart designed is displayed.

8.5 Sample Chart Reports

In the following chapters, you can see several samples on charts.

8.5.1 Sample Chart Report 1

If you have selected **Governorate** as a chart category, **# of Projects** / **# of Requests** as values to be shown on the chart, clicked the **3D Column** chart button to specify the chart type, and activated the **Data Table** option in the *View* window, the following chart report will appear (Figure 41):

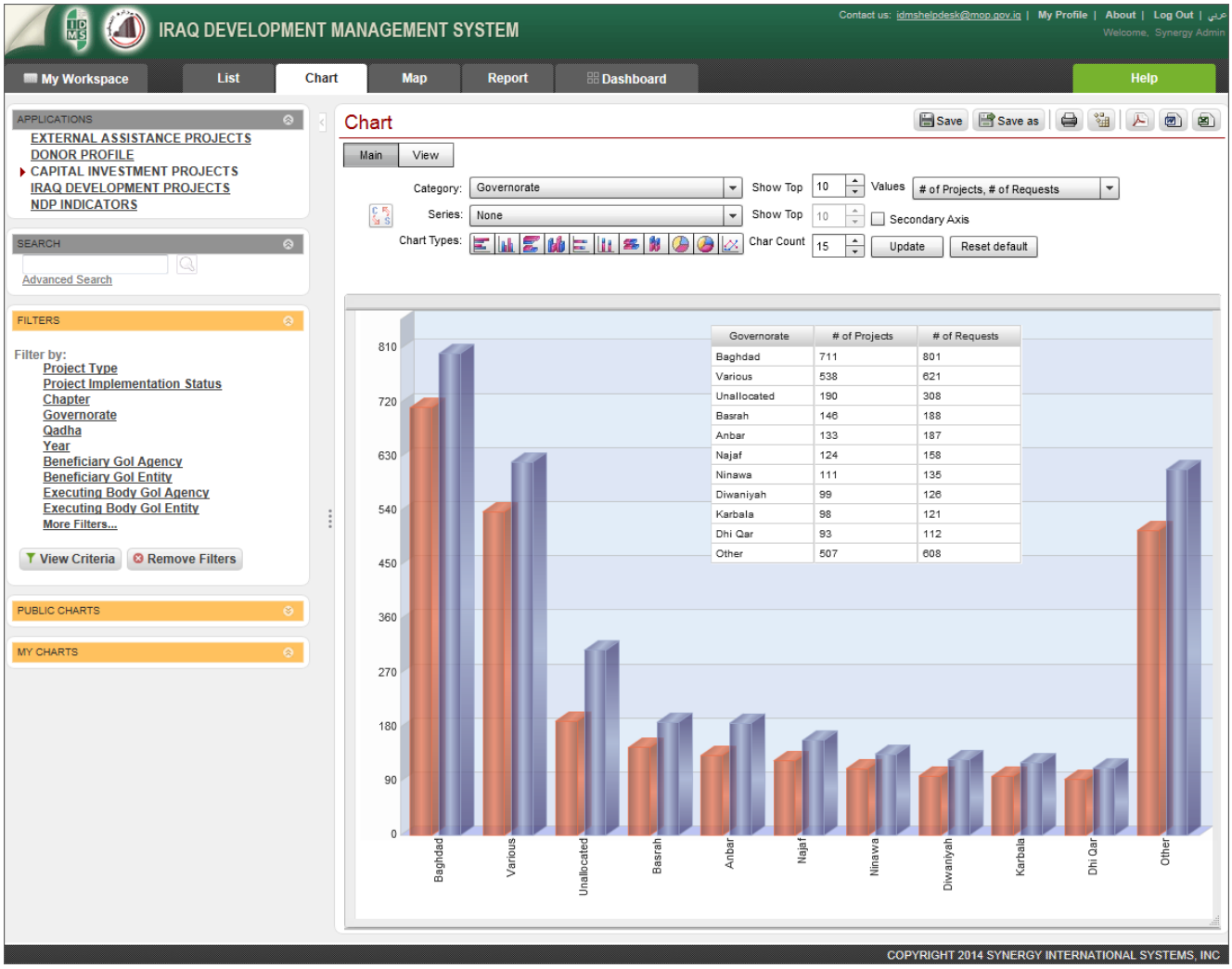


Figure 41: Sample Chart Report 1

8.5.2 Sample Chart Report 2

If you have selected **Project Implementation Status** as a chart category, **# of Projects** / **Project Cost (USD)** as values to be shown on the chart, clicked the **3D Pie** chart button to specify the chart type, and activated the **Data Table** and **Legend** options in the *View* window, the following chart report will appear (Figure 42):

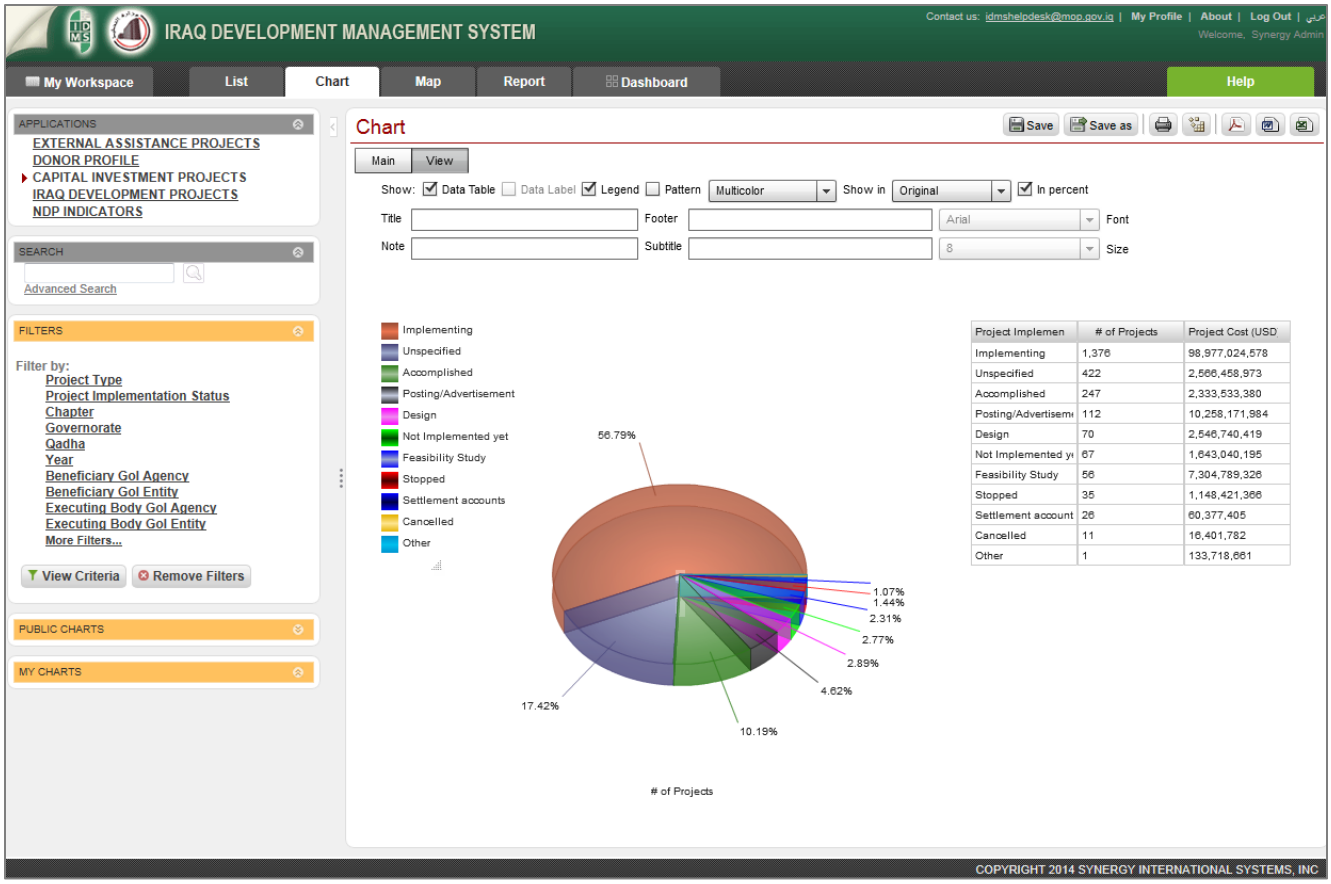


Figure 42: Sample Chart Report 2

9. MAP MODULE

In the *Map* module of *IDMS*, you can make use of an advanced GIS tool for data visualization, mapping and analysis.

In this module, you can plot data directly on a map and then access that data through the map. You can also query, aggregate, disaggregate, filter, and edit data on a map, visually capture data at any desired level, from the most general to the most detailed, down to the district level.

Moreover, the GIS tool offers an impressive array of state-of-the-art, advanced GIS features, such as the ability to zoom freely; to select a point on a map and ask the system to display any category of data within a given radius ('buffered zone querying').

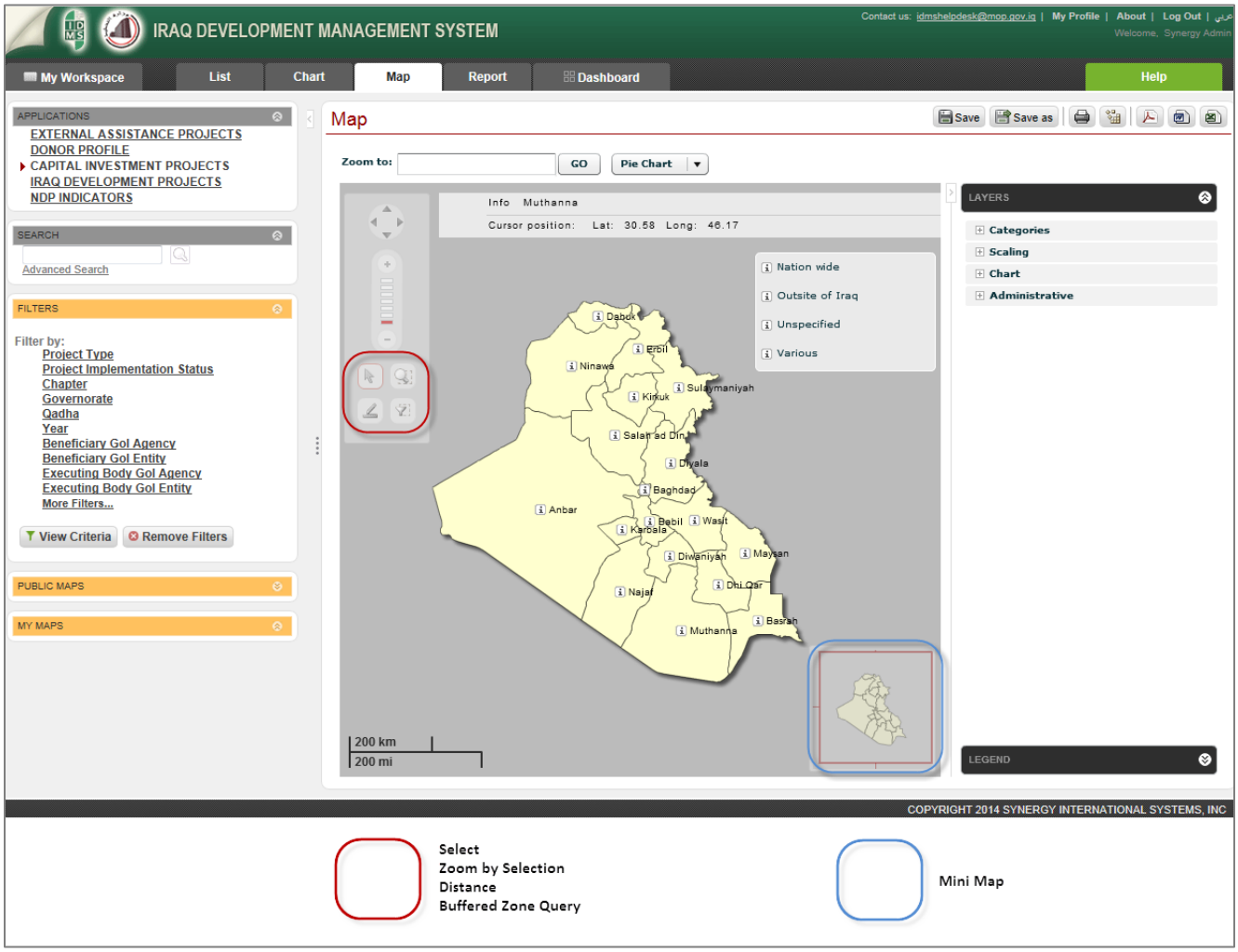


Figure 43: Map Module

9.1 Key Features of the GIS Tool

Below are the key features of the GIS tool in the *IDMS* application:

- Vector-based platform

- Multi-layer mapping
  - Dynamic number of administrative territorial units
  - Category or Indicator data
  - Static Data (Borders, Cities, Rivers, Roads, Construction Sites, etc.)
  - Names and Labels
  - Any other type of layer

- Data visualization features
  - Plotting Category or Indicator Data as icons/images/flags
  - Plotting data based on GPS coordinates
    Any layer which contains data associated to a precise GPS coordinate can be plotted on the map.
  - Coloring administrative territories based on dynamic scaling (e.g. level of certain pollution)
  - Plotting graphs on maps
  - Attaching photo images to GPS locations (or conditional locations)

- Reference features
  - Legend
  - Dynamic legends are displayed depending on the selection of layer(s).
  - Tooltips
  - Details of an administrative territories
  - Details on plotted categories and indicators

- Navigation features
  - Free zoom-in/zoom-out
  - Mouse wheel-based zoom-in/zoom-out
  - Scaled zoom-in/zoom-out
  - Map Panning (mouse drag and buttons)
  - Mini Map Preview
    The preview displays a small window of the entire world or country and is used for quick navigation to a desired location with one click without having to zoom out, find the new location and zoom in again.

- GIS specific features
  - Distance Measurement
  - Buffered Zone Querying
  - Geocoding

- Internationalization features
  - User interface multi-lingual capability
  - Map multi-lingual capability

- Export & Print
  - Export to PDF, Word, or Excel
  - Print

- Interoperability
  - Map retrieval via web services

9.2 Accessing the Map Module

The system provides for the opportunity to present data on the map of the country. In order to access the *Map* module of the system, click the **Map** tab. You will be navigated to the *Map* module where the map of the country is displayed.

In the *Map* module, you can choose to view different data sets displayed on the map, create and display reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

9.3 Map Module Screen Components

The following figure describes some of the features available in the main screen of the *Map* module (Figure 43):

1. **Zoom to panel -** allows free zooming to the desired administrative unit (governorate or district).

2. **Chart type selector -** allows defining whether the data should be presented in form of a pie chart or a bar chart when plotting graphs on the map.

3. **Navigation controls -** a set of tools that provide common navigation functions, such as panning and zooming.

4. **Map -** the map of the country.

5. **Scale Bar -** allows you to work out the distances on the map. The distances are expressed both in the metric and English units of measure.

6. **Mini Map -** an overview map of the entire country displayed in a small window allowing quick navigation to a desired location with one click without having to zoom out, find the new location and zoom in again.

7. **Layers Panel -** provides a variety of data to choose to display on the map.

8. **Legend Panel -** explains the categories and data series displayed on the map.

9. **Location information section -** displays the name of the administrative unit when it is pointed on the map.

10. **Cursor position section -** displays the geographic coordinates (expressed as latitude and longitude) for any point on the map.

9.4 Working in the Map Module

9.4.1 Zooming in / Zooming out

The GIS tool is equipped with the advanced zooming capabilities used to enlarge or reduce the view of the map on the screen. The following zooming options are available:

Free zoom in / zoom out

This option allows you to easily explore the data through Intelligent Searching. You can enter any combination of letters in the *Zoom to* panel and select the administrative territory (district) to navigate to from the list containing the search results (Figure 44). The selected item will be magnified and displayed in the main screen.

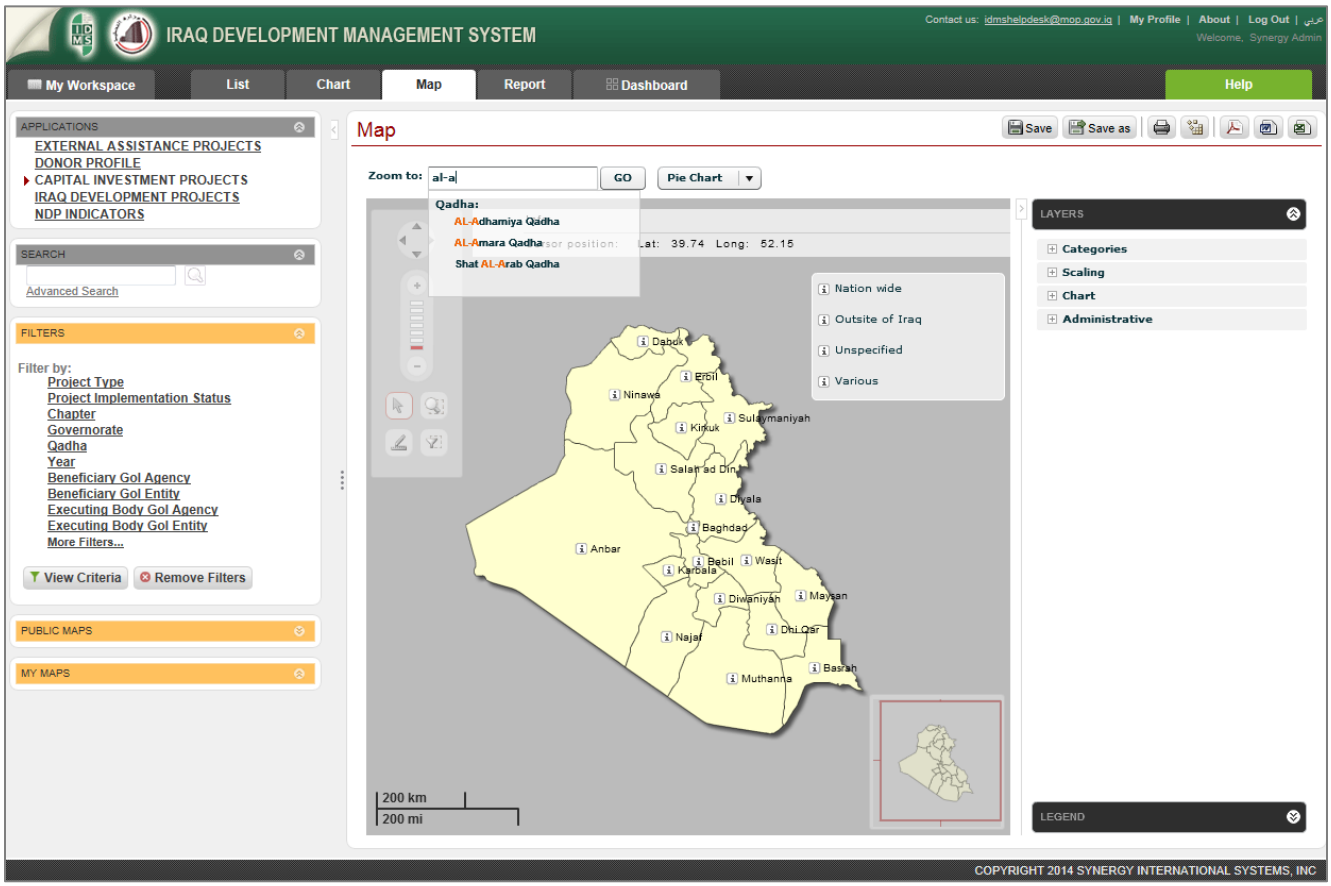


Figure 44: Intelligent Searching

Scaled zoom in / zoom out

This option allows zooming in / zooming out using the scale tool available in the Advanced GIS.

This means that when changing the zoom scales by clicking either on or , you can magnify or reduce the viewport according to the scale value.

Mouse wheel-based zoom-in / zoom-out

This option supports mouse wheel-based zooming in / zooming out. In order to enlarge or reduce the viewport using the scroll wheel button of the mouse, you should click anywhere on the map and use the wheel button in the backward motion to zoom in and in the forward motion to zoom out.

Zoom by Selection

This option allows magnifying the original viewport or a portion of it using the mouse. To be able to enlarge an area on the map, you should activate the *Zoom by Selection* option by clicking the button then select a region on the map to magnify.

9.4.2 Measuring Distance

In the Map module, you can measure the distance between two points on the map.

To do this, click button, select the point on the map and drag the mouse to the second point to trace a path to measure (Figure 45). The measured distance will be expressed both in metric and English units of measure.

Note: Measuring is calculated using the latitude and longitude coordinates from point to point and does not consider elevation.

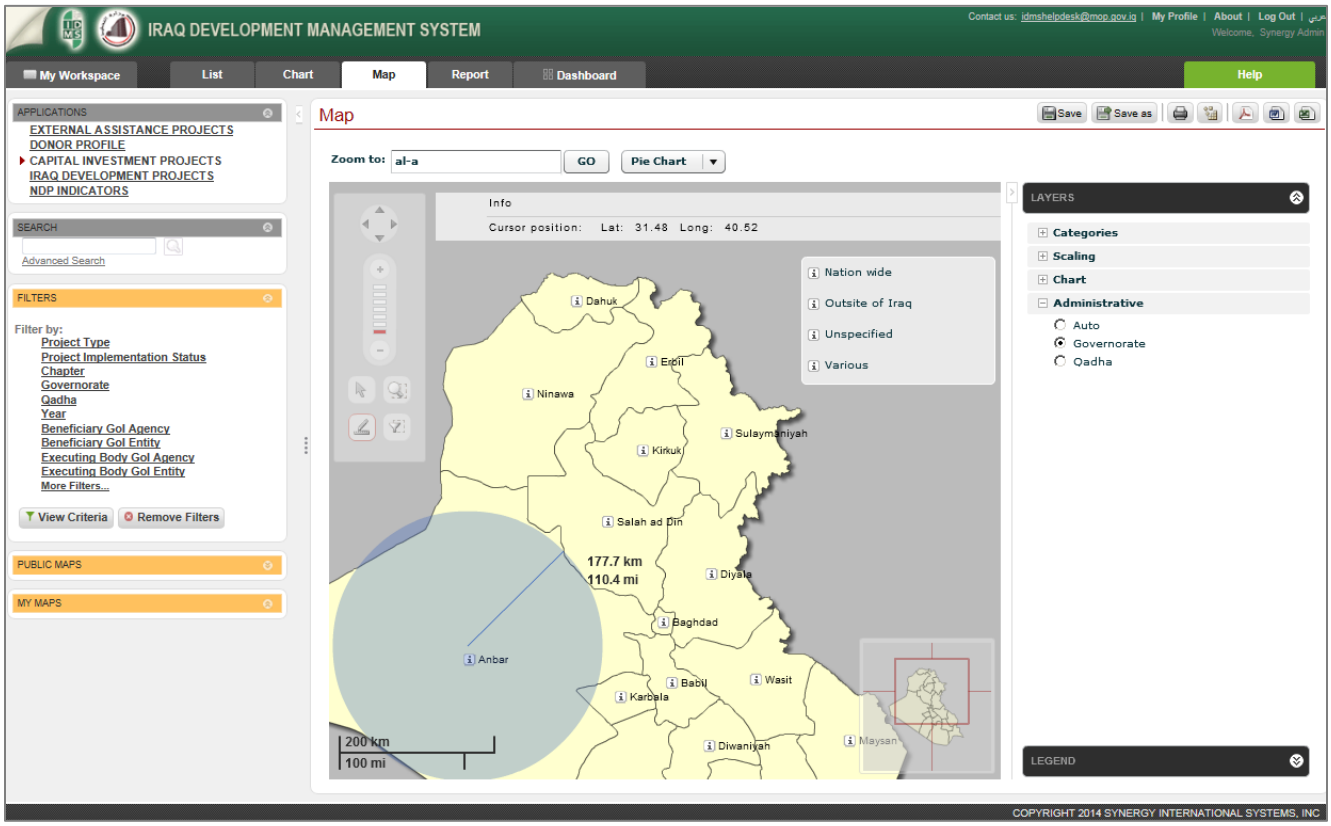


Figure 45: Measuring Distance

9.4.3 Buffered Zone Querying

This feature in the Advanced GIS tool is used to select a point on a map and display any type of data within a given radius. In addition, the tool is easily navigable through a Mini Map, Navigation Bar and Intelligent Search Tools.

To be able to create a buffered zone to view data for, select the button, and then select the region on the map to highlight. The selected area will be activated while the rest of the screen will be disabled (Figure 46). This tool may be useful for presentations on screenshots to mark the selected area on the map.

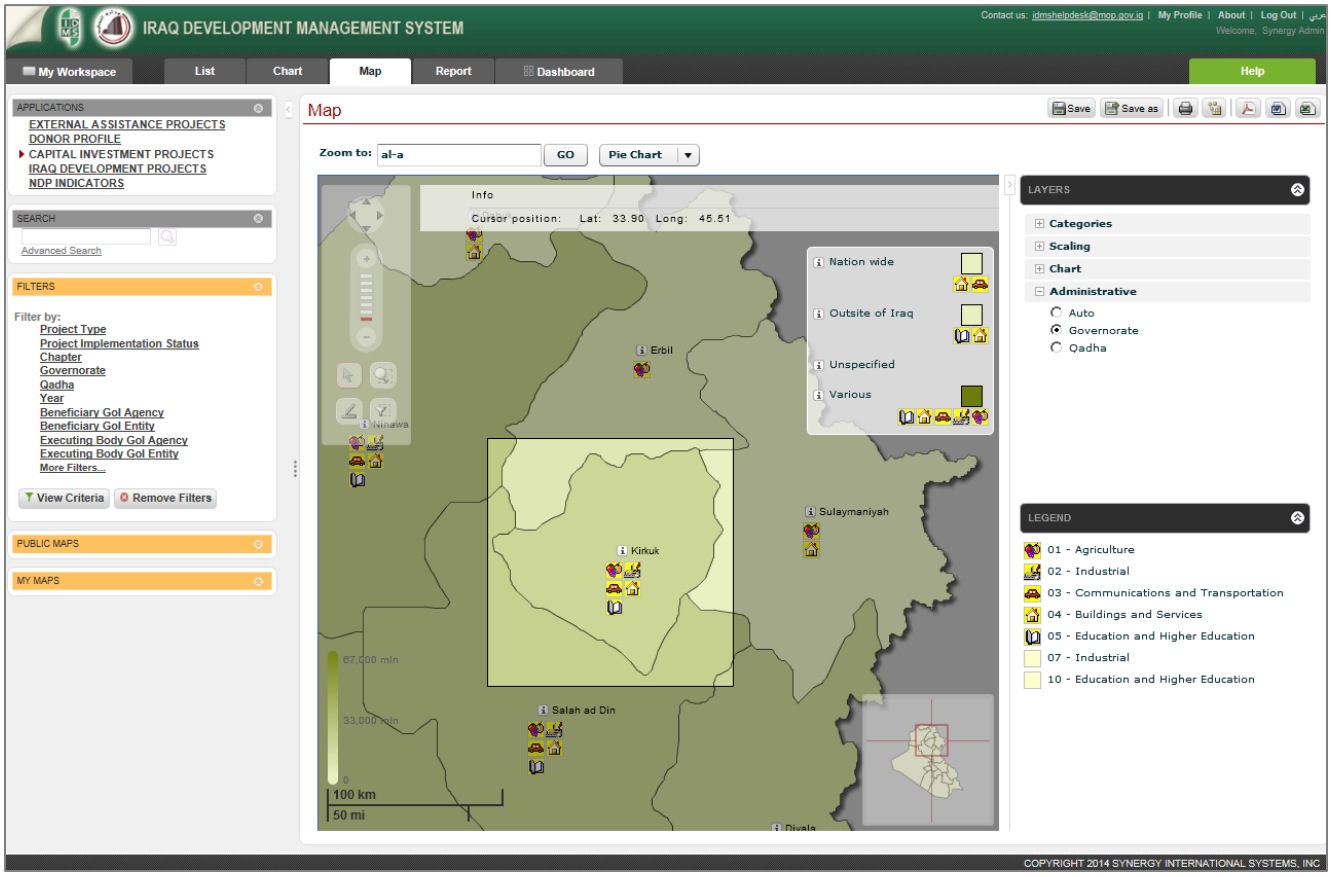


Figure 46: Buffered Zone Querying

9.4.4 Using Layers

The *Layers* feature in the *Map* module provides a variety of data to select to display over the viewing area. You can use the *Layers* feature to display the following information:

- Display categories;
- Choose to view data on a scaling map;
- Plot data in the form of different graphs (pie chart or bar chart);
- Display map features such as governorate or qadha borders.

The following layers can be applied in *IDMS*:

Categories

This option is used to plot category data on the map and to view them in form of different icons / images. To enable this option, expand the *Category* section and selecting the category(ies) listed.

Note: When pointing the mouse cursor on a respective icon/image on the map, you can view the details for the selected category.

Scaling

This option is used to view the data on a scaling map. This means that the selected data series will not be displayed in form of graphs, but the administrative territories will be colored according to the selected scaling category instead. The scaling legend at the bottom left side of the map prompts on the coloring pattern used.

To enable this option, expand the *Scaling* section in the *Layers* panel and select one of the possible alternatives listed.

Chart

You can plot different data series on a map and view them in the form of different graphs, such as pie charts or bar charts. You can turn on this option by expanding the *Chart* section in the *Layers* panel and selecting the chart category(-ies) to be displayed on the map. By default, the selected category(-ies) will appear in the form of a pie chart. However, you can choose the view the data in the form of a bar chart by selecting the appropriate option from the *Chart Type* drop-down (Figure 47).

Note: When pointing the mouse cursor on any of the chart constituents, you can view the data that stands behind it. The details on plotted chart categories are displayed when clicking the button.

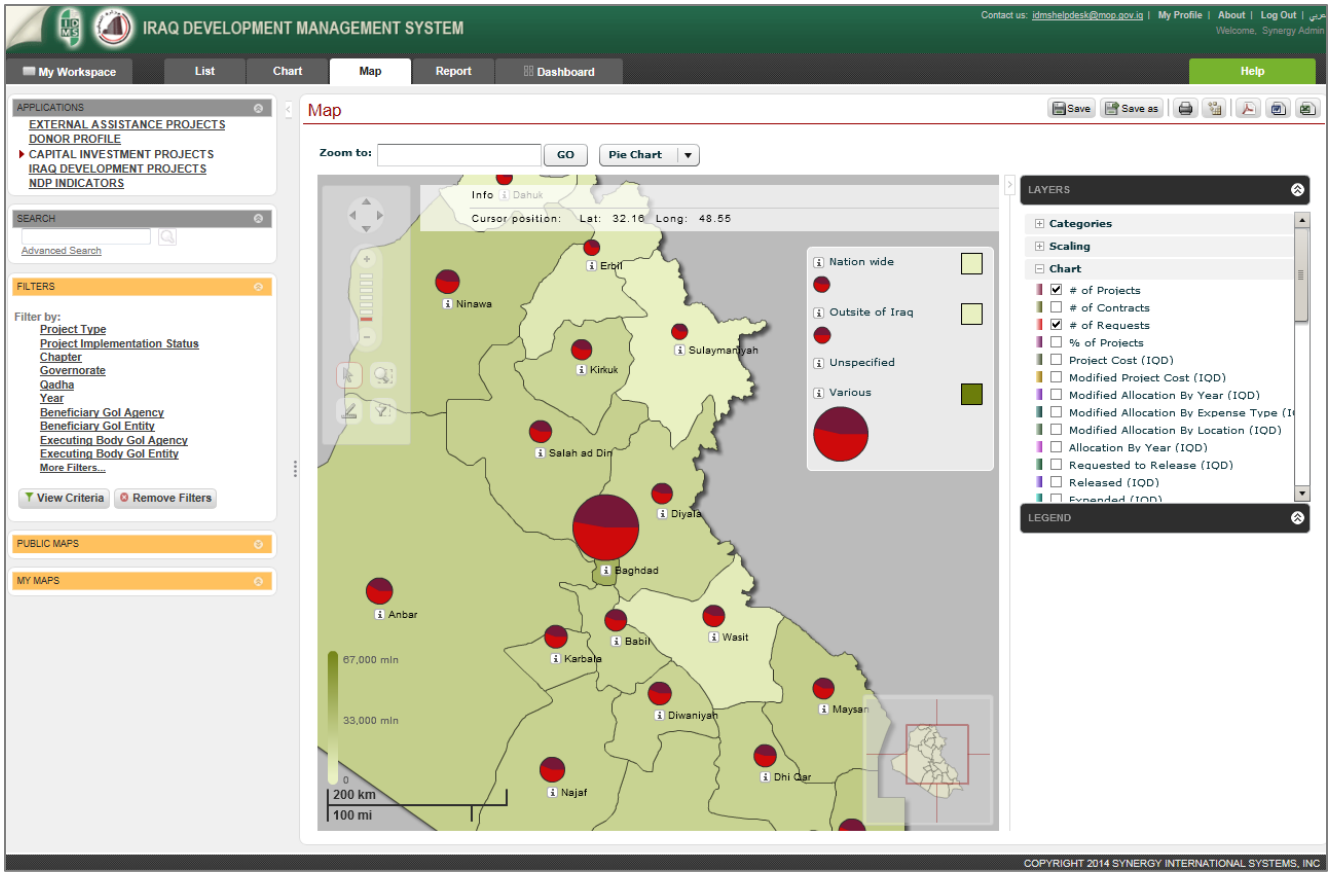


Figure 47: Selecting Chart Type

Administrative

You can turn on border information by expanding the *Administrative* section in the *Layers* panel and selecting one of the following options:

- **Auto -** displays border information for all territorial units when the zoom in is selected. For example, if you zoom in to the qadha level, the border information for both governorates and qadhas will be displayed on the map.
- **Governorate -** displays the border information for all governorates.
- **Qadha–** displays the border information for all qadhas.

9.4.5 Viewing Legend

To explain the data series or categories on the map, the legend is used to identify the patterns or colors that are assigned to the selected categories (Figure 48). It is worth mentioning that each data series or category is represented by a unique pattern or color in the map legend, which is displayed in the following ways:

- In the *Legend* section if you have chosen to apply any category to the map.
- At the bottom left side of the map if you have selected to view data on the scaling map.

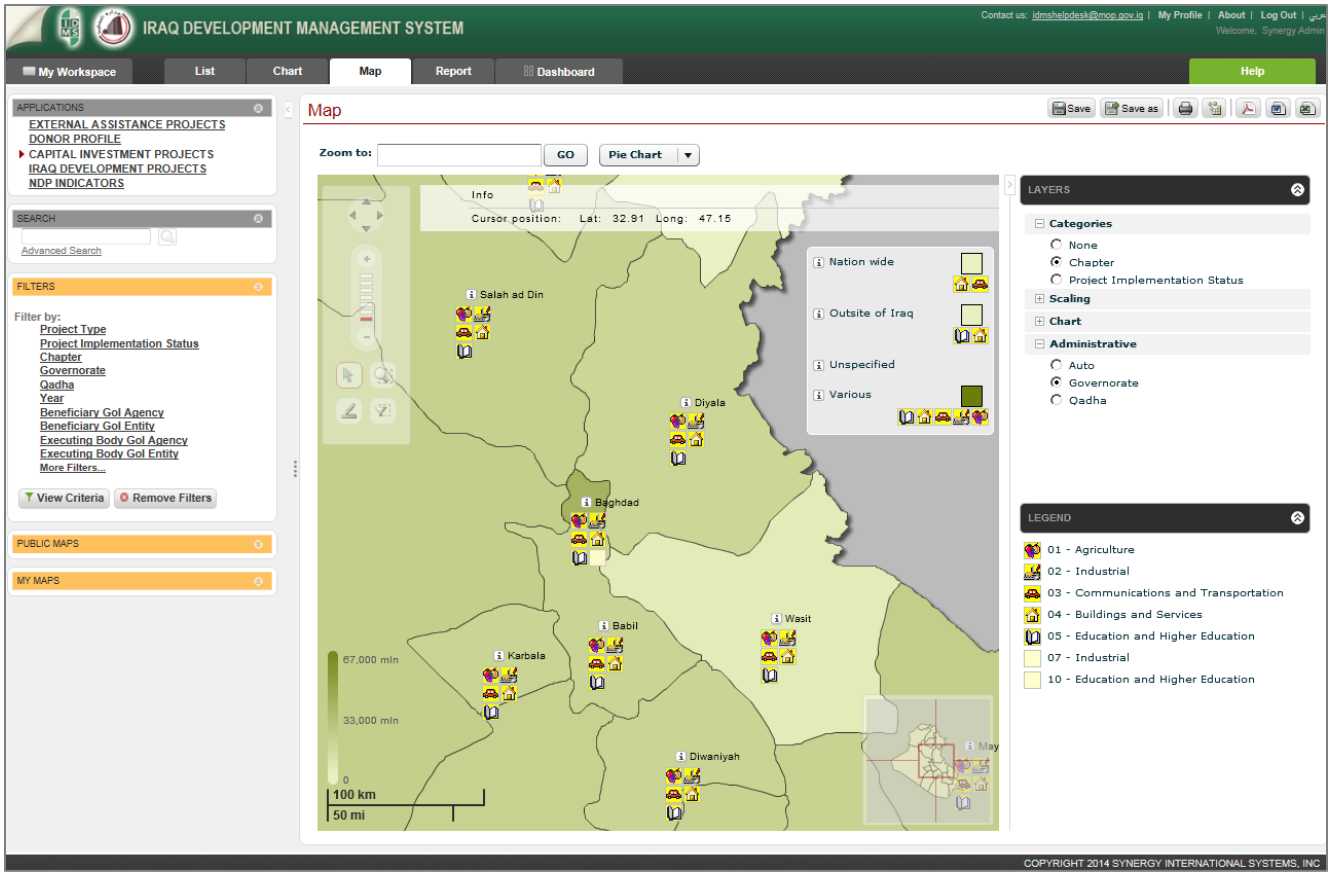


Figure 48: Viewing Chart Legend

9.4.6 Using Mini Map

The Mini Map window feature displays an additional view of the country map with a position indicator that corresponds to the current view inside the main screen (Figure 49). One of the main features of the Mini Map is that while the Mini Map window responds to position adjustments in the main screen, you can also interact directly with it. Double-clicking any area within the window or dragging the position cursor to the desired place will adjust position both in the Mini Map and in the main screen to the point in the Mini Map window that the user selects.

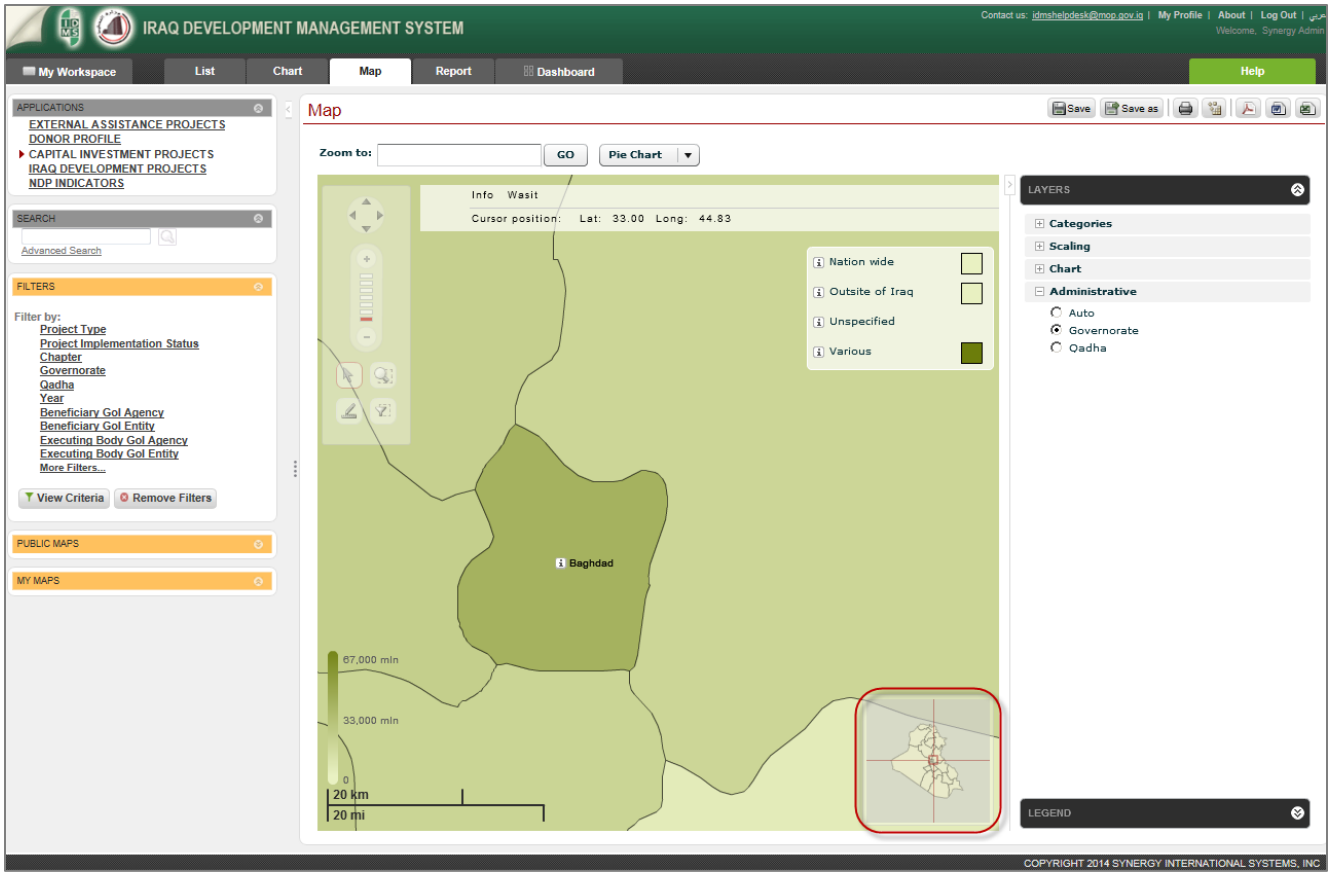


Figure 49: Using Mini Map

9.4.7 Viewing the Data Displayed on the Map

The Advanced GIS tool is used to view the data referring to definite territorial units – governorates and/or cities/villages when zoomed in to this level. In order to access the data for a specific territorial unit, point the mouse cursor on the ℹ button (Figure 50). The information that is displayed in the information window includes but is not limited to # of projects implemented in the given administrative territory, # of contracts, # of requests, etc. If you have plotted any chart category on the map, the chart category details appear in the information window as well.

Also, you can view information on nationwide projects and the ones implemented in outside of Iraq. Moreover, you can also view the synopsis of the projects that do not have any territorial reference or are of various types. To view data on these projects, point the mouse cursor on ℹ button in the respective section.

Note: Clicking the **View Projects** link at the bottom of the information window will take you to the *Details* section of the application. For more information about the actions that can be taken in this section, see DETAILS SECTION.

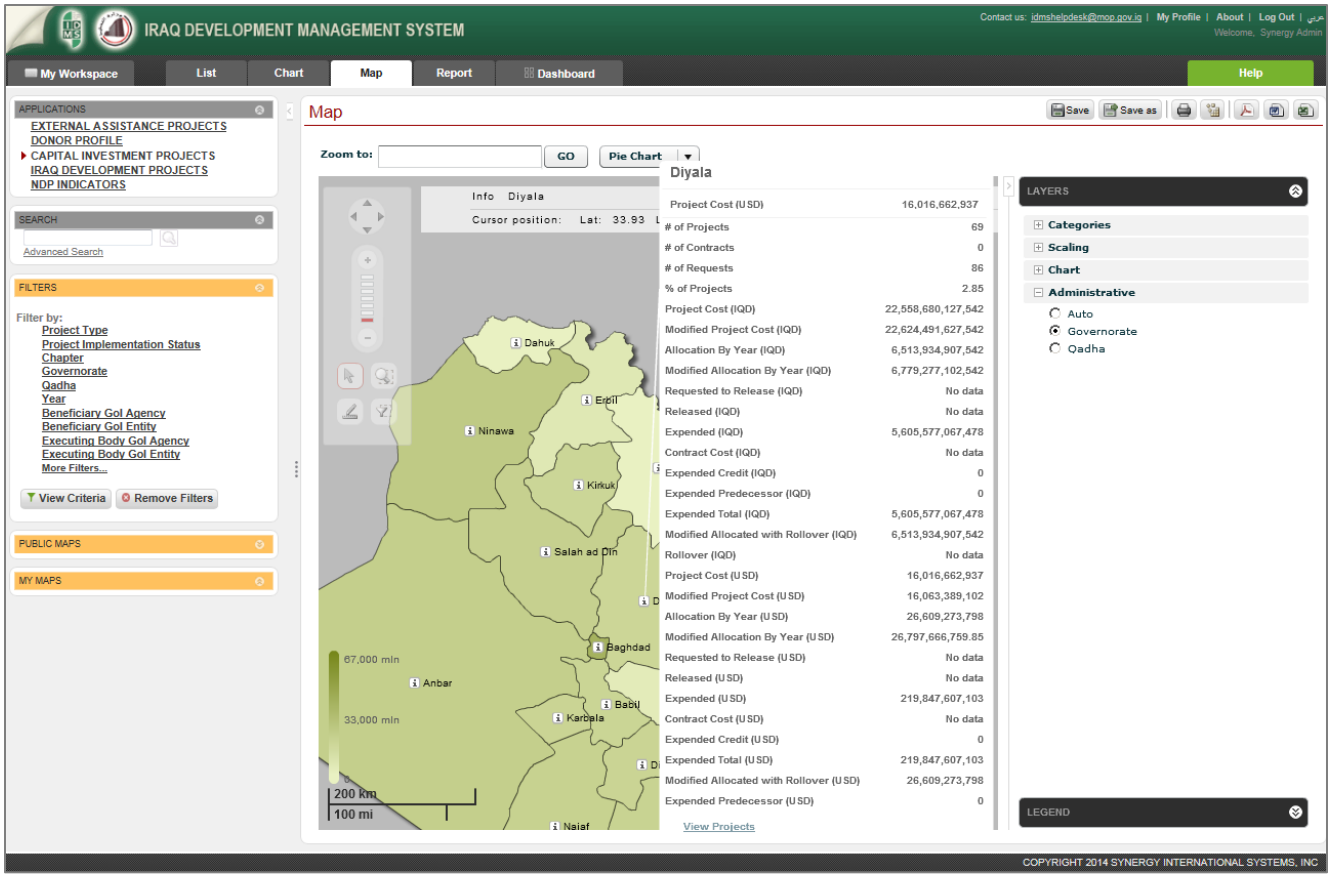


Figure 50: Viewing the Data Displayed on the Map

9.5 Sample Map Reports

In the following chapters, you can see several samples on maps.

9.5.1 Sample Map Report 1

You will get the following map report if you have selected **Project Implementation Status** as a map category and opened the **Legend** panel (Figure 51):

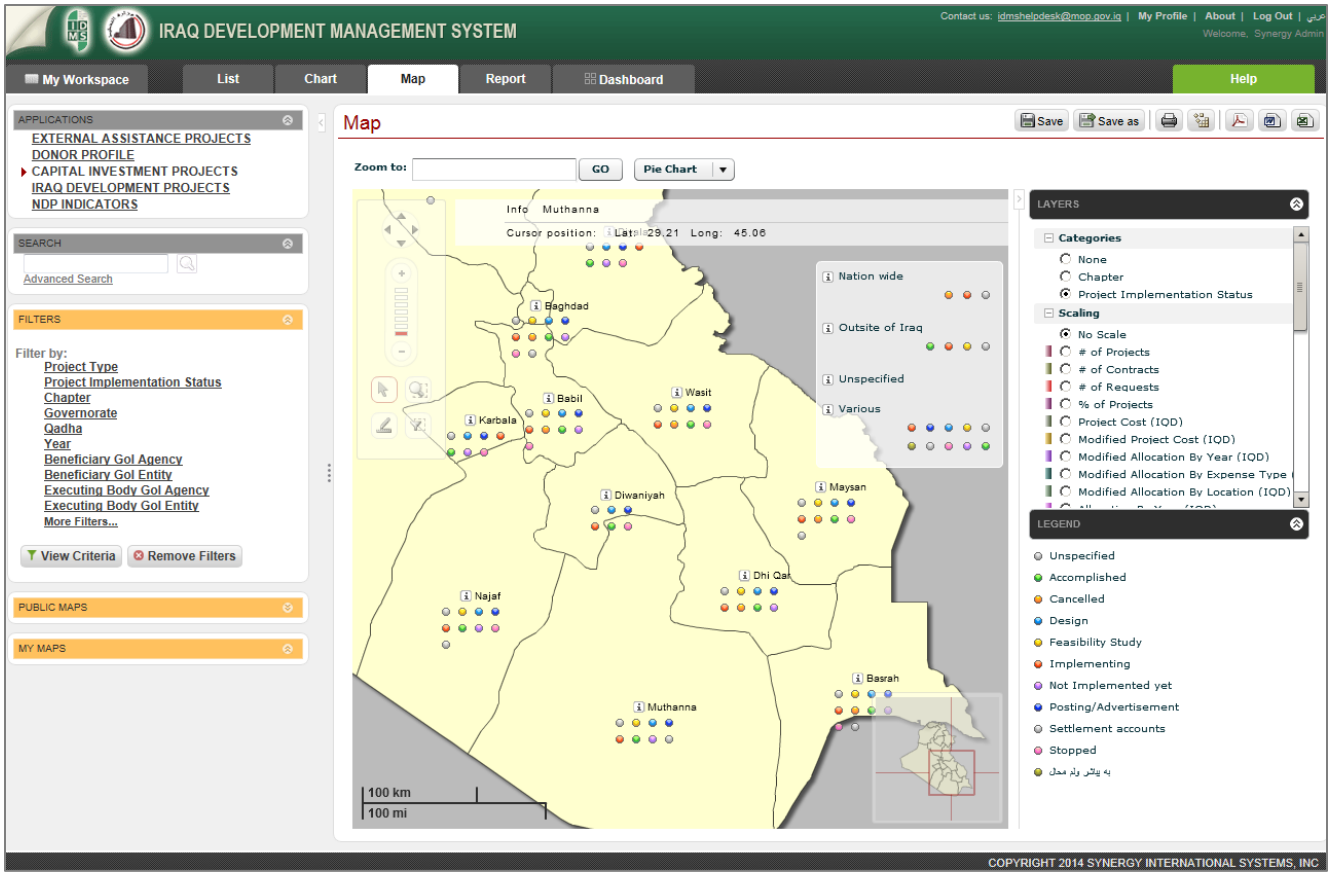


Figure 51: Sample Map Report 1

9.5.2 Sample Map Report 2

If you have selected **Project Cost (USD)** as a map scale, the following map report will appear (Figure 52):

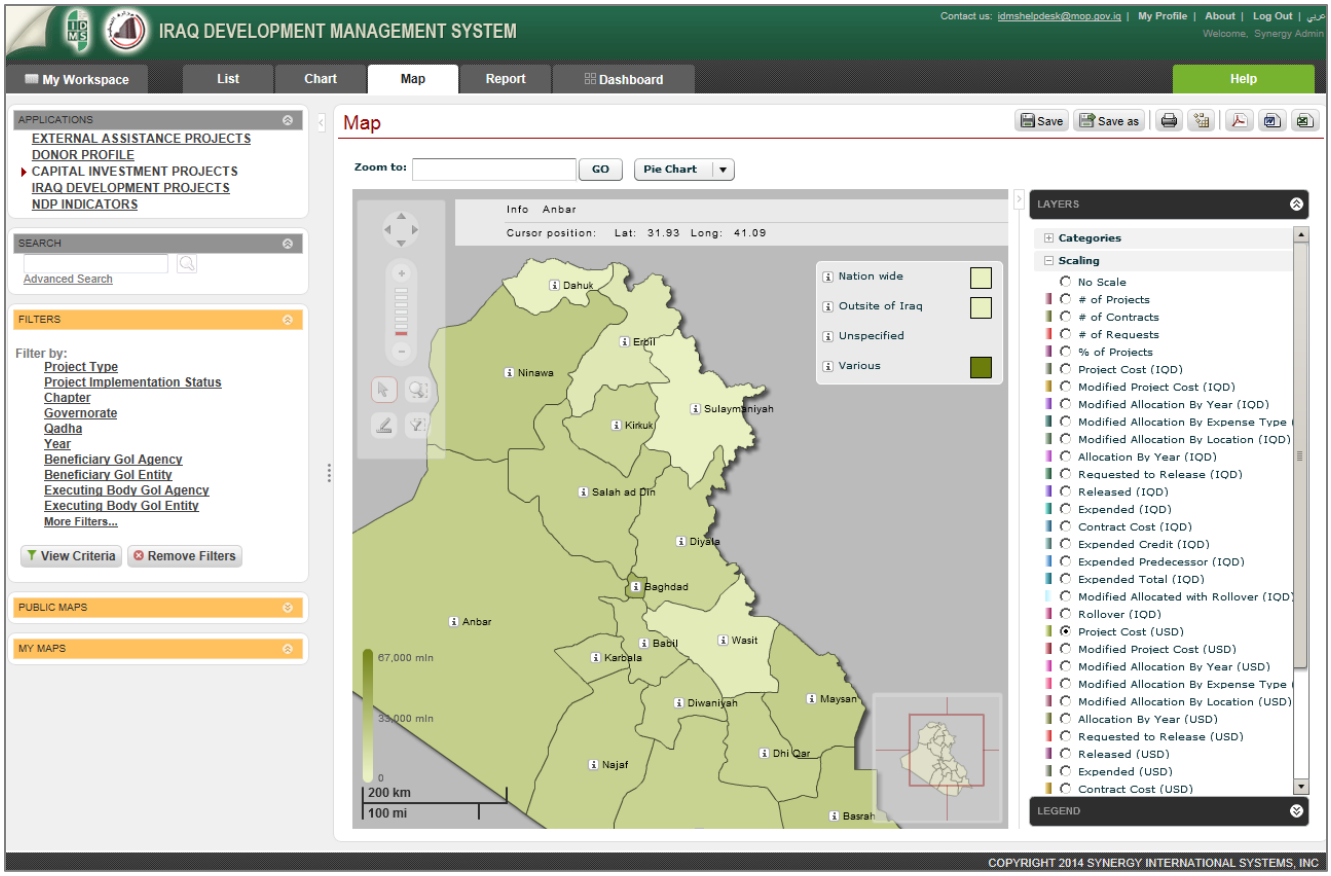


Figure 52: Sample Map Report 2

10. REPORT MODULE

In the *Report* module of the *IDMS* application, you can create and execute ad-hoc queries on the data, and acquire results in the form of different reports.

10.1 Accessing the Report Module

As it has been stated above, the system provides for the opportunity to create different sorts of list reports. In order to access the *Report* module of the system, click the **Report** tab. You will be navigated to the *Report* module of the application where the *Report Designer* (Figure 53) will open.

In this module, you can create list reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

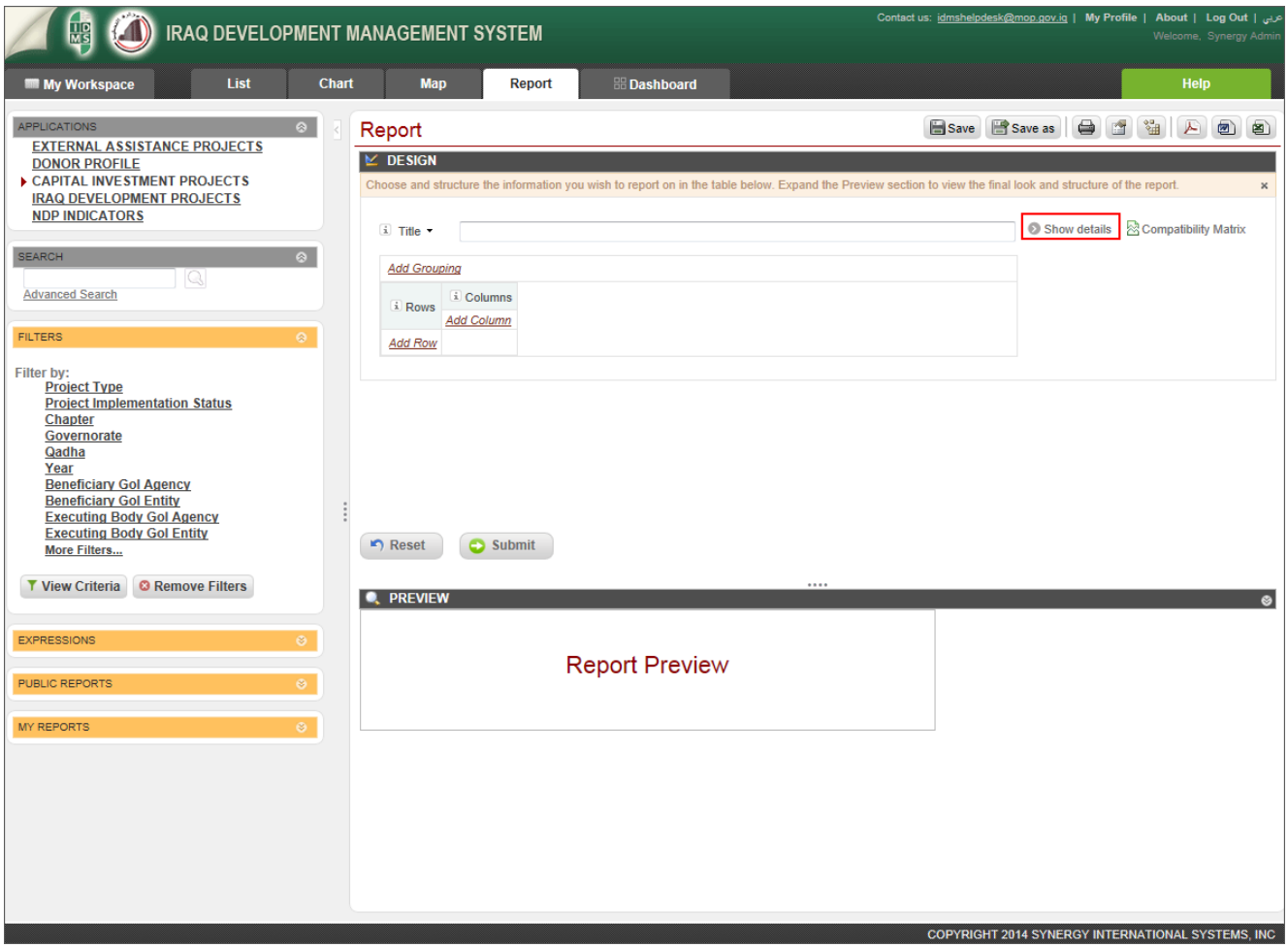


Figure 53: IDMS Application Report Module

10.2 Creating a Report

In order to create a report, i.e. to structure the report table and choose what information should appear in the rows and columns of the table, add report components, which are:

- **Text entries** – title, subtitle, header, and footer. For these fields, the expected input is a free text.
  Note: By default, the *Report Designer* gives you the possibility of adding report titles. However, you can change the default view to make adjustments for other text entry components (sub-title, header and footer) as well. To be able to provide additional textual information to the report, you will have to click the **Show Details** link and provide the appropriate information in the fields that emerge. Clicking the **Hide Details** link will collapse the text entry fields displaying only the **Title**.
- **Report grouping** - allows grouping data according to a specific category. Grouped data appear in different tables. Each table contains data that fall under one group of the category specified.
- **Rows** - group data within the report table.
- **Columns** - show details specific to each table row.
- **Sub-columns** - divide the row details displayed under each column.

In order to add report components, follow the steps below. They provide instructions on how to compose and submit queries.

1. Type the text that should appear as the report title in the **Title** text box.
2. Enter a **Subtitle**, **Header**, and **Footer** if needed.
3. In the *Group Report by* section, specify the category, which will be used to group data into different tables. To add a report grouping, click the **Add Grouping** link in the *Group Report by* section and select the appropriate category from the menu that appears (Figure 54).
   Note: The report will be divided into as many tables as there are table groupings selected.
4. Select table rows by clicking on the **Add Row** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one row at a time from the list of available rows.
5. Select table columns by clicking on the **Add Column** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one column at a time from the list of available columns.
   Note: Once the report column is selected, an **Add Sub-column** link becomes available under the selected column. It allows indicating how the row details displayed under each column will be divided.

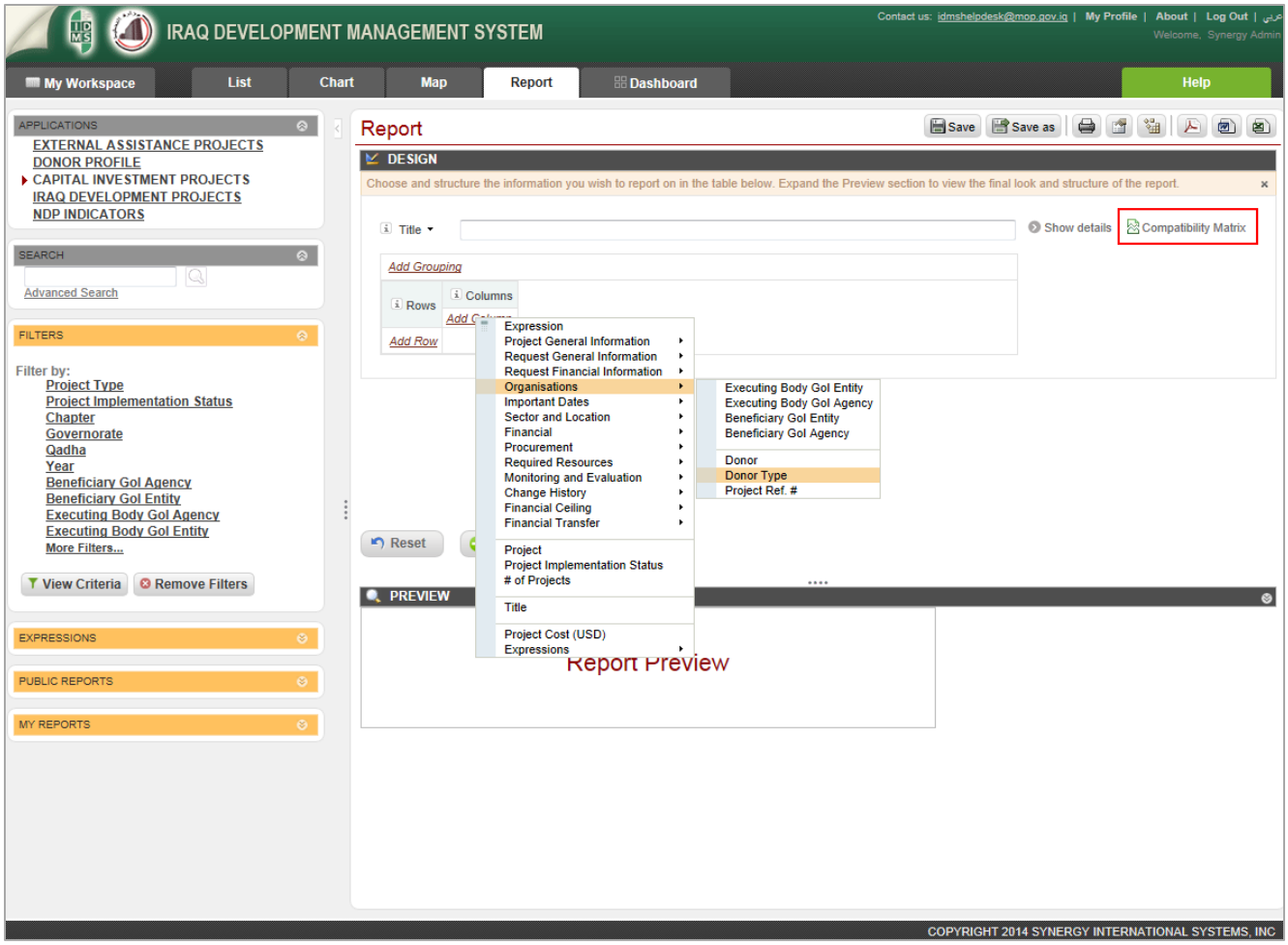
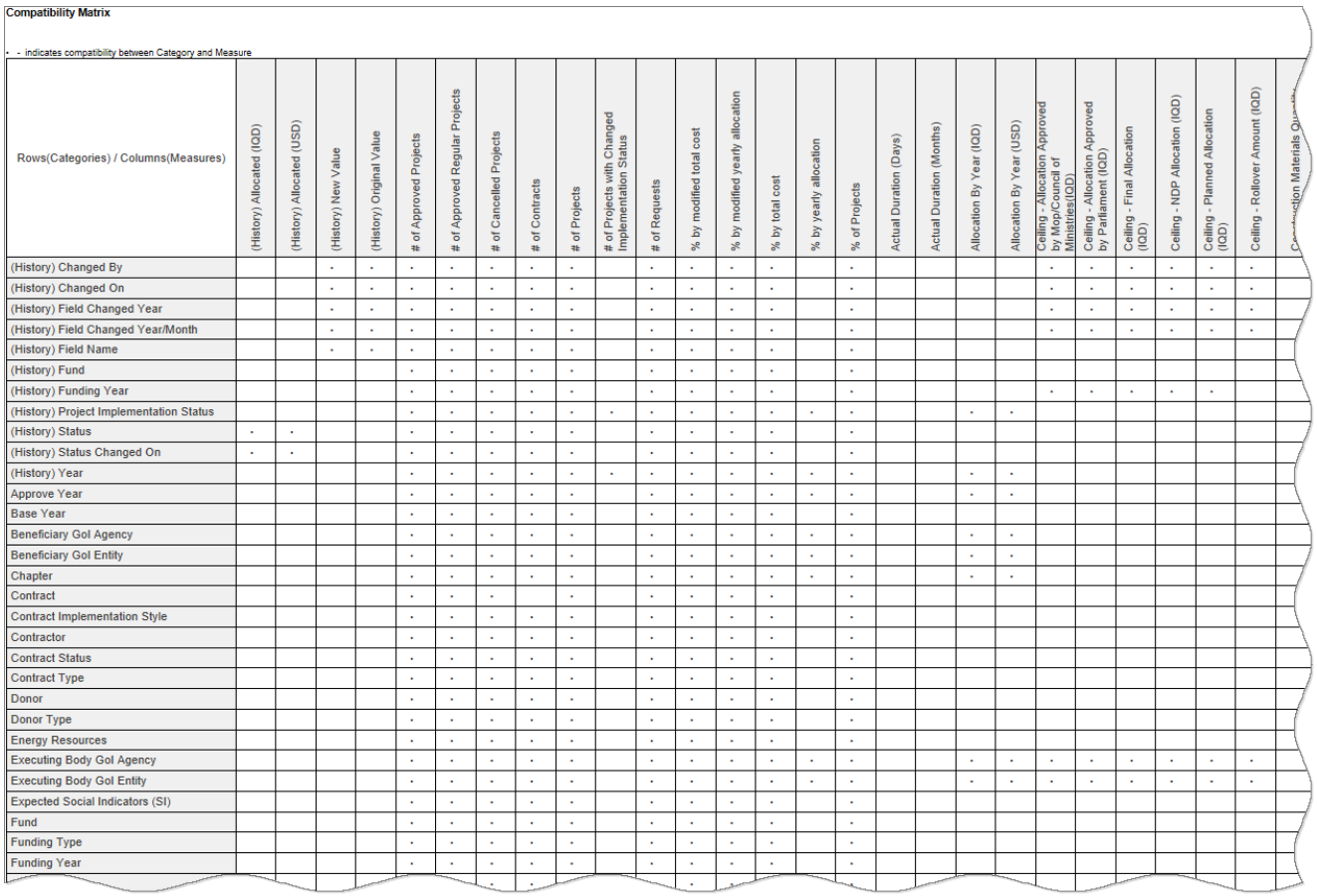


Figure 54: Selecting a Grouping for a Report

Note: At any point it is possible to remove all components selected for the report and design a new report from scratch by clicking the

(Reset) button.

Note: If you have defined a report which has incompatible columns (columns over which reports cannot be generated), they will be marked in red and an error message will occur. To make your reports productive, use the link (as marked in red, Figure 54) to open the *Compatibility Matrix* table (Figure 55). This is a table that displays the compatibility between all categories and measures in the database to display them in the report.



Compatibility Matrix

• - indicates compatibility between Category and Measure

Rows(Categories) / Columns(Measures)	(History) Allocated (IQD)	(History) Allocated (USD)	(History) New Value	(History) Original Value	# of Approved Projects	# of Approved Regular Projects	# of Cancelled Projects	# of Contracts	# of Projects	# of Projects with Changed Implementation Status	# of Requests	% by modified total cost	% by modified yearly allocation	% by total cost	% by yearly allocation	% of Projects	Actual Duration (Days)	Actual Duration (Months)	Allocation By Year (IQD)	Allocation By Year (USD)	Ceiling - Allocation Approved by MoP/Council of Ministries(IQD)	Ceiling - Allocation Approved by Parliament (IQD)	Ceiling - Final Allocation (IQD)	Ceiling - NDP Allocation (IQD)	Ceiling - Planned Allocation (IQD)	Ceiling - Rollover Amount (IQD)	Construction Materials Qu
(History) Changed By			•	•	•	•	•	•	•		•	•	•	•		•					•	•	•	•	•	•	
(History) Changed On			•	•	•	•	•	•	•		•	•	•	•		•					•	•	•	•	•	•	
(History) Field Changed Year			•	•	•	•	•	•	•		•	•	•	•		•					•	•	•	•	•	•	
(History) Field Changed Year/Month			•	•	•	•	•	•	•		•	•	•	•		•					•	•	•	•	•	•	
(History) Field Name			•	•	•	•	•	•	•		•	•	•	•		•											
(History) Fund					•	•	•	•	•		•	•	•	•		•											
(History) Funding Year					•	•	•	•	•		•	•	•	•		•					•	•	•	•	•		
(History) Project Implementation Status					•	•	•	•	•	•	•	•	•	•	•	•			•	•							
(History) Status	•	•			•	•	•	•	•		•	•	•	•		•											
(History) Status Changed On	•	•			•	•	•	•	•		•	•	•	•		•											
(History) Year					•	•	•	•	•	•	•	•	•	•	•	•			•	•							
Approve Year					•	•	•	•	•		•	•	•	•	•	•			•	•							
Base Year					•	•	•	•	•		•	•	•	•		•											
Beneficiary GoI Agency					•	•	•	•	•		•	•	•	•	•	•			•	•							
Beneficiary GoI Entity					•	•	•	•	•		•	•	•	•	•	•			•	•							
Chapter					•	•	•	•	•		•	•	•	•	•	•			•	•							
Contract					•	•	•		•		•	•	•	•		•											
Contract Implementation Style					•	•	•	•	•		•	•	•	•		•											
Contractor					•	•	•	•	•		•	•	•	•		•											
Contract Status					•	•	•	•	•		•	•	•	•		•											
Contract Type					•	•	•	•	•		•	•	•	•		•											
Donor					•	•	•	•	•		•	•	•	•		•											
Donor Type					•	•	•	•	•		•	•	•	•		•											
Energy Resources					•	•	•	•	•		•	•	•	•		•											
Executing Body GoI Agency					•	•	•	•	•		•	•	•	•	•	•			•	•	•	•	•	•	•	•	
Executing Body GoI Entity					•	•	•	•	•		•	•	•	•	•	•			•	•	•	•	•	•	•	•	
Expected Social Indicators (SI)					•	•	•	•	•		•	•	•	•		•											
Fund					•	•	•	•	•		•	•	•	•		•											
Funding Type					•	•	•	•	•		•	•	•	•		•											
Funding Year					•	•	•	•	•		•	•	•	•		•											

Figure 55: Compatibility Matrix

10.3 Previewing a Report

At any time during the process of creating a report, look in the *Preview* section at the bottom of the page, in order to view the final structure of the report (Figure 56). The *Preview* will not be ready for viewing unless there is at least one table row defined.

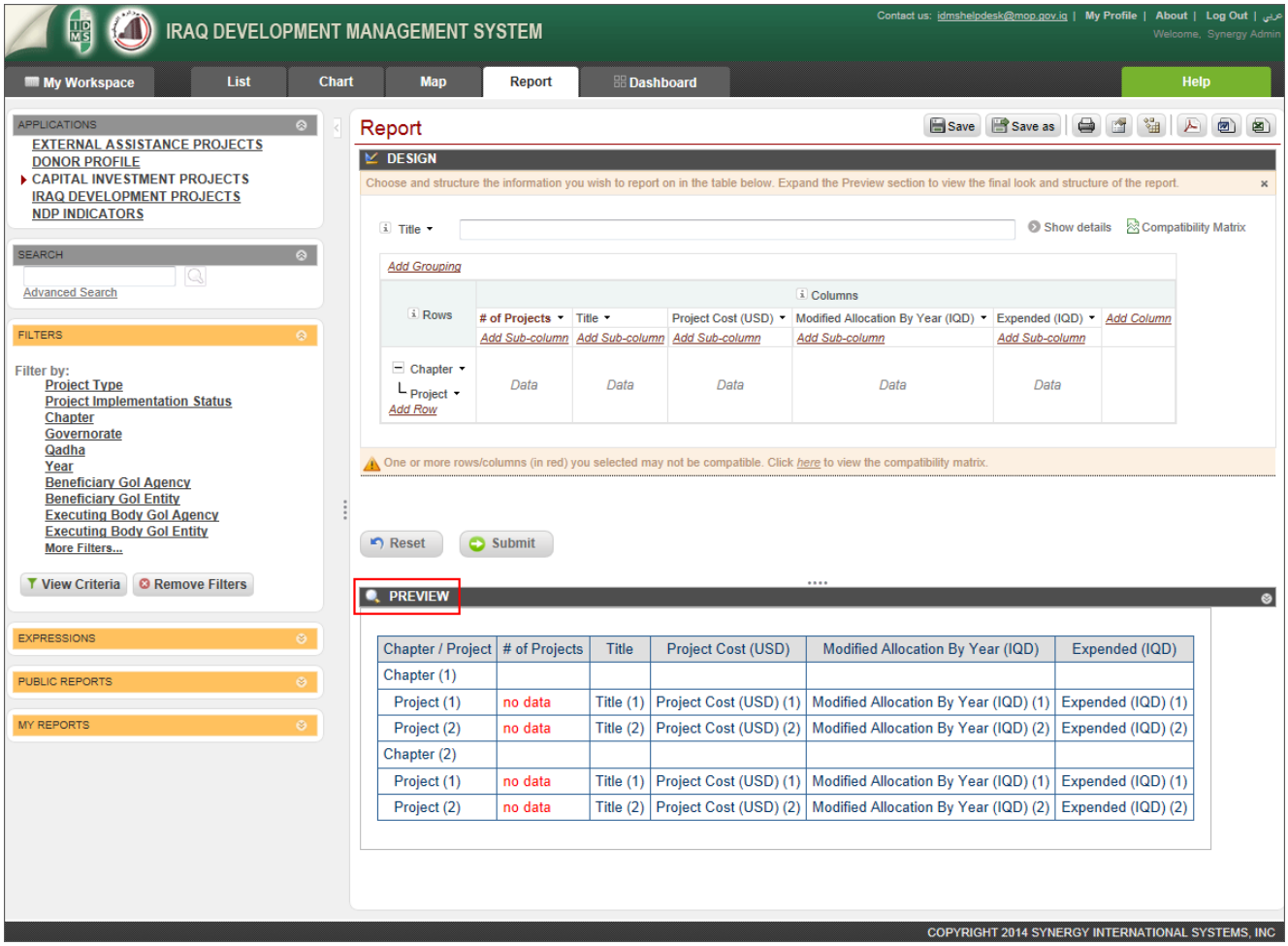


Figure 56: Previewing the Report

All your added report components and structuring results will be displayed in the *Preview* section which helps you to check whether the report matches the required output or not. This section can be expanded in order to display whole of the information.

10.4 Generating a Report

The final step in the process of creating a report is report generation. By clicking the

(Submit) button, a request to the Reporting Engine is submitted in order to access the database, gather the required data and present it in the manner required. The report containing all the real data appears in a new window.

Note: If the report to be generated is to contain a large number of data, it may take a while to generate it. To reduce the report load time, it is highly recommended that you redesigned the report and/or applied filters so that you could focus on specific data and reduce the report size. For more details on how to set report filters, see Refining the Report.

10.5 Sample Reports

In the following chapters, you can see several samples on reports.

10.5.1 Sample Report 1

If you have indicated:

- **Donor** as the report table grouping;
- **Project** as the row;
- **Title**, **Project Cost (USD)**, and **Modified Project Cost (USD)** as columns (Figure 57);

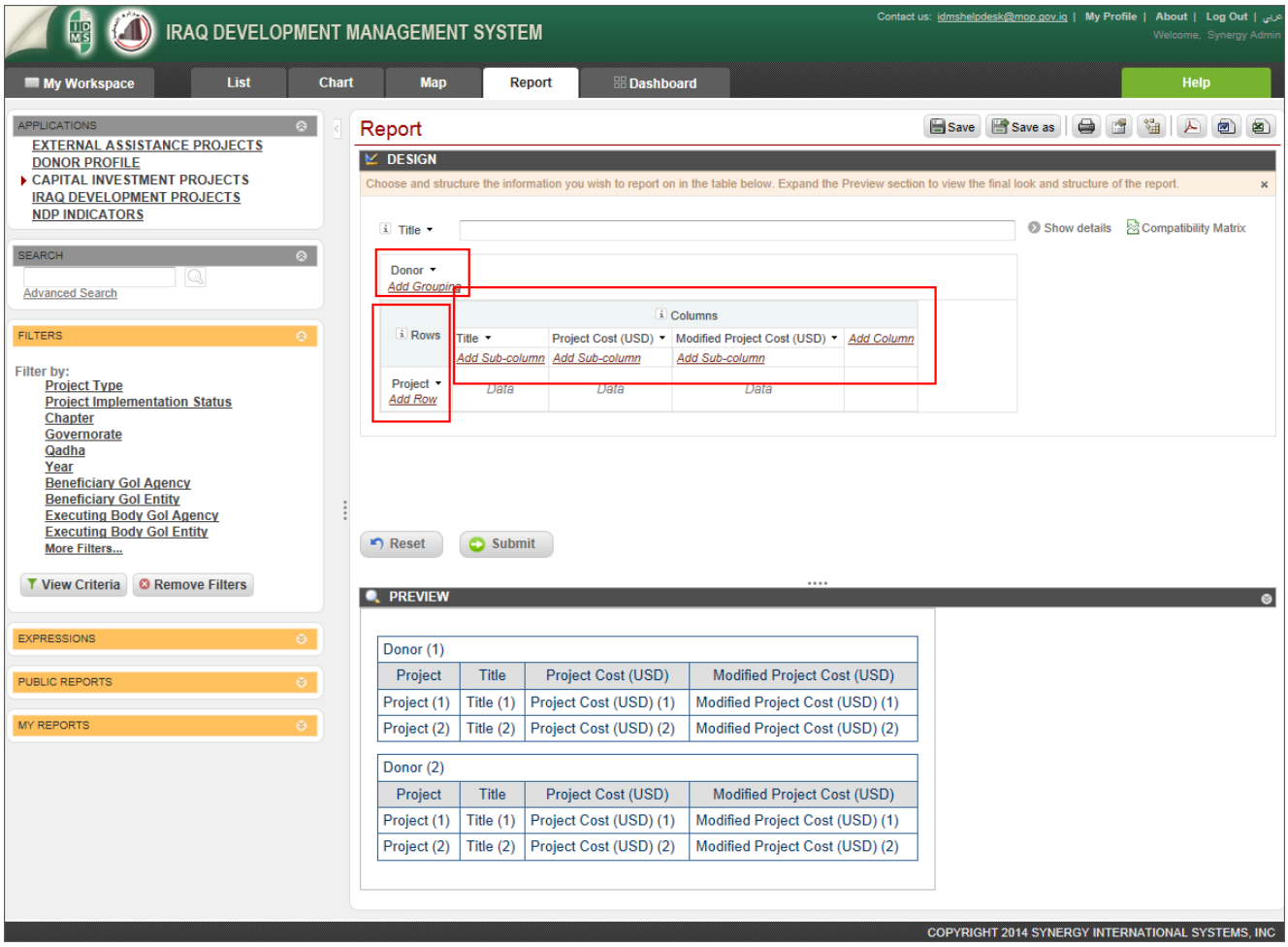


Figure 57: Creating Report 1

You will have the following result (Figure 58):

Refine Report

Donor Please Select

Submit Reset

Unspecified

Project	Title	Project Cost (USD)	Modified Project Cost (USD)
CIP/170577	اعادة تاهيل ابنية عدد (8) في مجمع الكسرة العسكري	8,839,500	8,839,500
CIP/170578	استملاك اراضي لشرطة نينوى	1,775,000	1,775,000
CIP/170579	اعداد دراسات وتصاميم واستملاك اراضي لشرطة بابل	3,063,650	3,063,650
CIP/170580	انشاء مقر قيادة الشرطة الاتحادية	493,805	493,805
CIP/170581	انشاء 46 مقر فوج حدودي	32,660,000	32,660,000
CIP/170582	تطوير وتاهيل واضافة بناء مديرية نجدة الشعب المستحدثة	463,914	463,914
CIP/170583	تطوير وتاهيل واضافة بناء مديرية نجدة الكاظمية	460,435	460,435
CIP/170584	تطوير وتاهيل بناية مديرية نجدة التحرير	201,995	201,995
CIP/170585	اعداد دراسات وتصاميم واستملاك اراضي لشرطة بغداد	3,614,184	3,614,184
CIP/170586	انشاء مراكز شرطة لشرطة بغداد	7,100,000	7,100,000
CIP/170587	اعداد دراسات وتصاميم واستملاك اراضي لمديرية المرور العامة	1,567,183	1,567,183
CIP/170588	انشاء بناية البات المرور العامة مع المستودعات	4,260,000	4,260,000
CIP/170589	انشاء اكاديمية الدفاع المدني في الديوانية	11,040,500	11,040,500
CIP/170590	اعمار مدينة تلعفر/المرحلة الثانية	53,995,500	53,995,500
CIP/170591	تجهيز مواد تحسين الشبكات الكهربائية في الانبار	0	10,651,651
CIP/170592	انشاء طريق رمادي - النخيب ((طريق الحج البري	0	56,800,000
CIP/170593	بناء 30 دار مع ملحقاتها لمنفذ عرعر الحدودي	0	3,195,000

Figure 58: Sample List Report 1

10.5.2 Sample Report 2

If you have indicated:

- **Governorate** as the report table grouping;
- **Project** as the report row;
- **Title** and **Project Cost (USD)** as columns (Figure 59);
- Applied a filter for the governorate field to show only Babil projects;

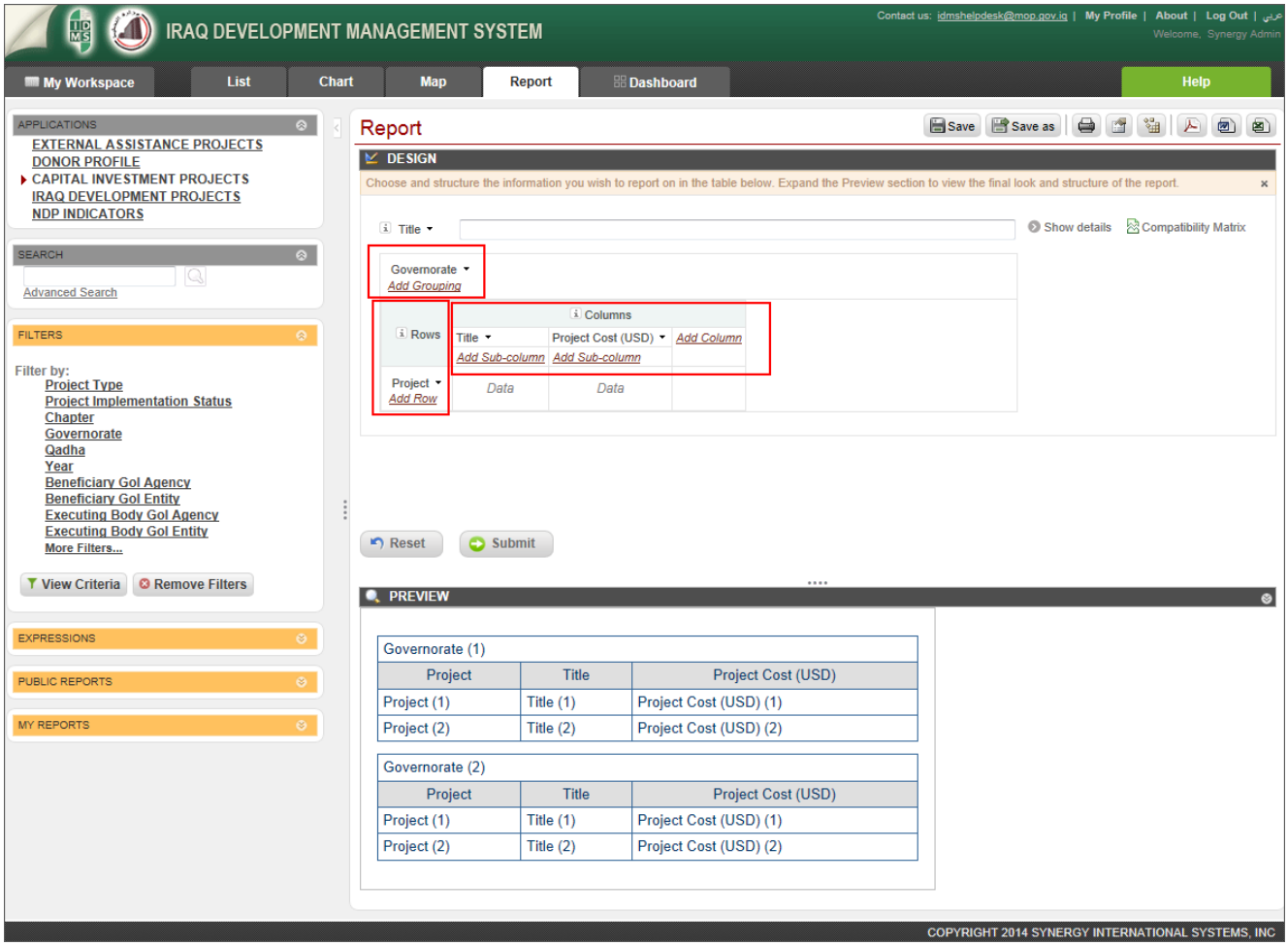


Figure 59: Creating Report 2

You will have the following result (Figure 60):

Figure 60: Sample List Report 2

10.6 Customizing Reports

You can customize the reports by assigning font characteristics to report components, re-ordering rows and columns, etc. The sections below will describe the instructions to customize the reports.

10.6.1 Formatting / Styling Report Components

You may format/style the text entries as well as main report table captions and values by assigning to them value characteristics such as font, font size, font color, background color, alignment (i.e. left, center, or right), etc. In order to format/style a report component, follow the steps below:

1. Click the report component that needs to be formatted / styled.
2. Select the **Properties** option from the actions list that appears (Figure 61).

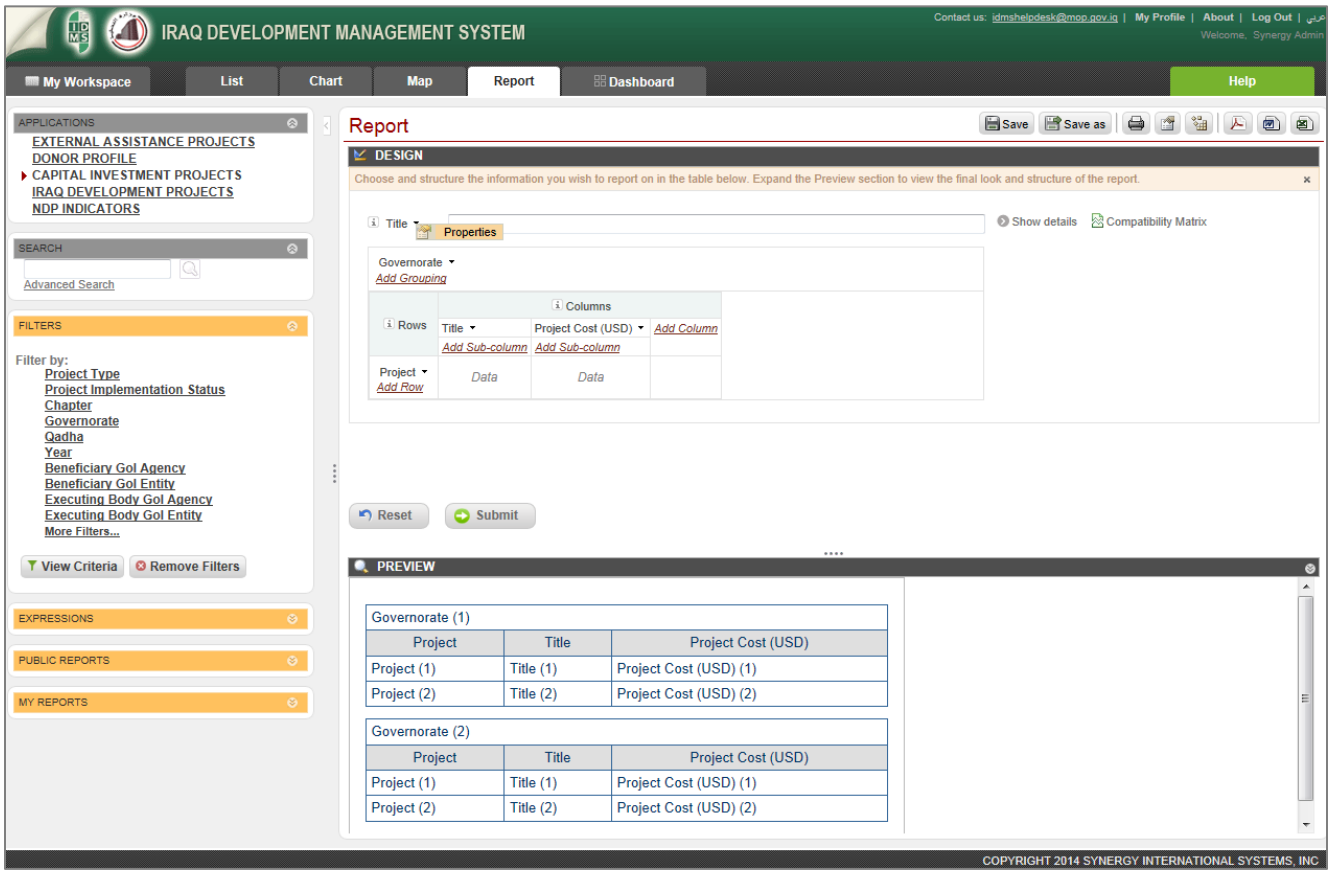


Figure 61: Reports Window with Properties Focus on the Title Field

The *Properties* window will appear. **Please note** that for text entries the *Properties* window includes text formatting buttons and a text area (Figure 62). For other report components, like rows, columns, etc., the *Properties* window also allows assigning additional characteristics, e.g. sorting order, reference text, etc. (Figure 64).

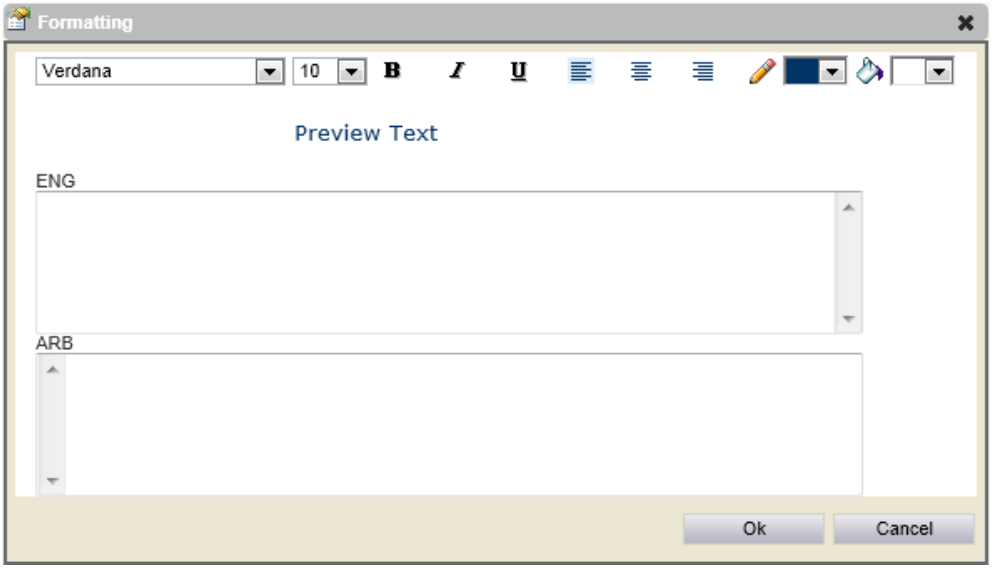


Figure 62: Formatting / Styling Text Entries

3. Change the properties as needed.
   Note: To prevent you navigating away from the section every time when modifying the properties of a different report table component, the *Properties* window allows selecting the next item to be modified. To do that, you need to select the appropriate instance from the *Items* drop-down list in the *Properties* window. The list contains the previously selected report table components.
4. Click the **Apply** button for the changes to take effect. Clicking the **OK** button will close the window and navigate you to the **Report** module.

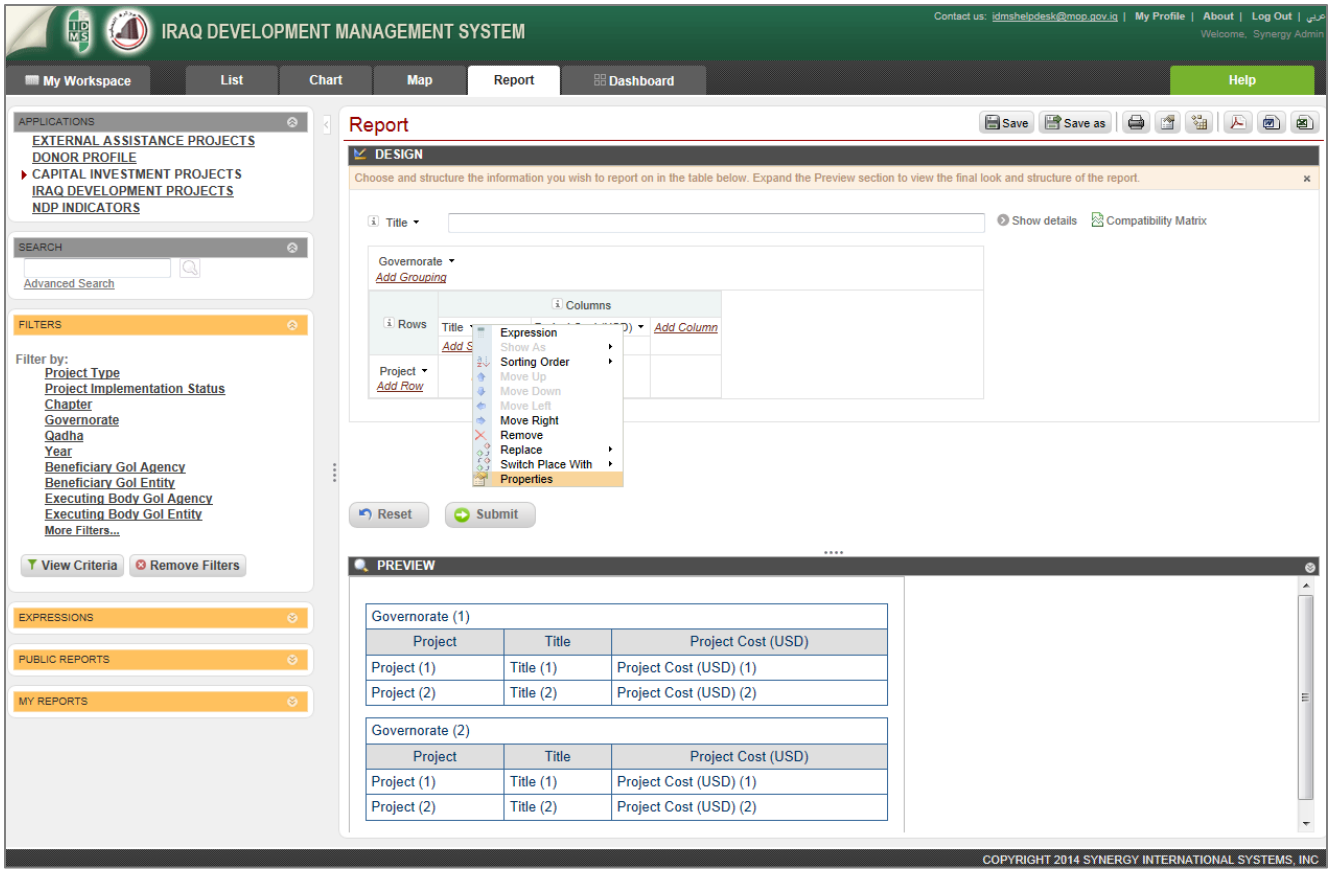


Figure 63: Reports Window with Properties Focus on the Column

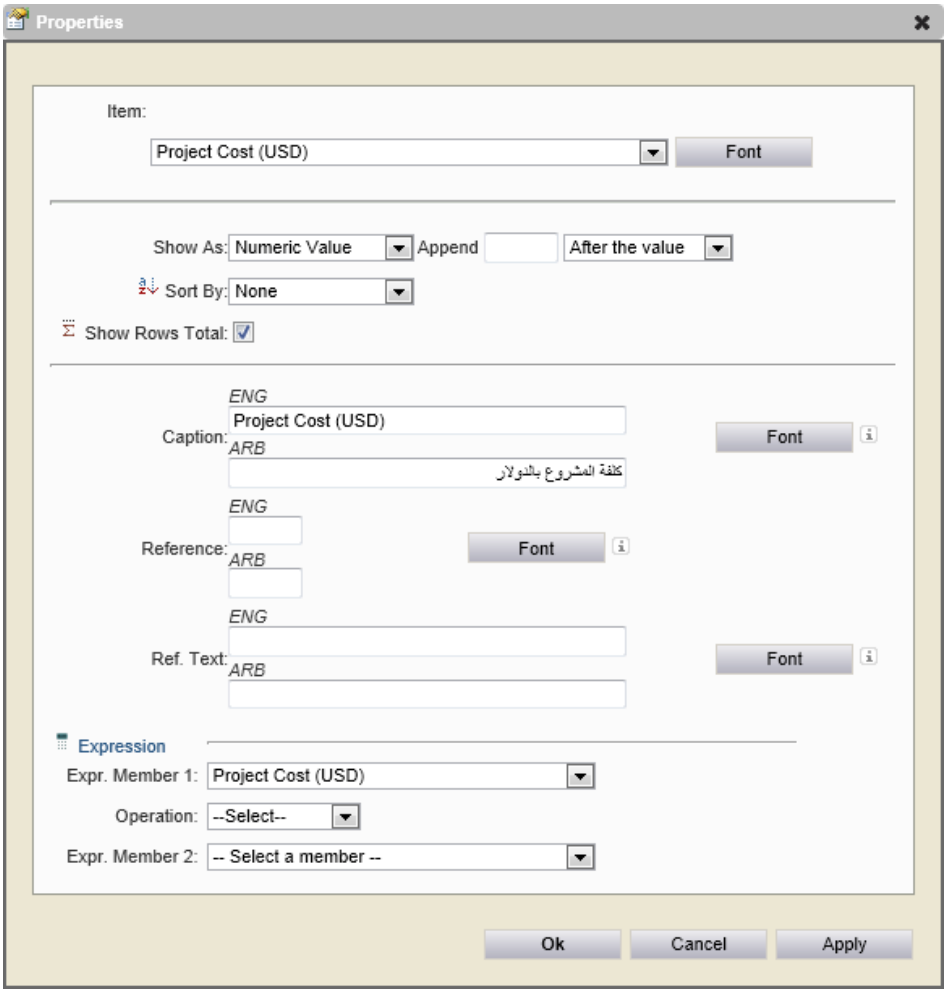


Figure 64: Assigning Properties to Report Table Components

10.6.2 Re-ordering Report Table Components

This option is used to establish and modify the order of the report table components, like rows, columns, etc. In order to re-order report table components, follow the steps below:

1. Click the component item that needs to be reordered in the report.
2. Select the respective **Move Up / Move Down / Move Right / Move Left** option from the menu that appears. The report generated will maintain the order of the items that was displayed in the *Report Designer* (Figure 65).

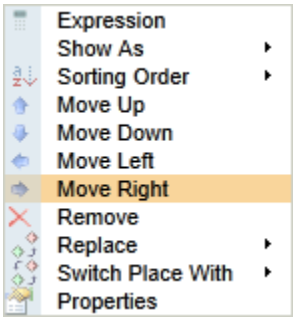


Figure 65: Reordering Report Table Components

Note: If any of these actions is not possible, the respective option will be disabled in the menu.

10.6.3 Defining the Data Display Type

You may select the way in which the numeric values to be included in the report will appear. In the final report, the numeric values can be expressed either as a *Numeric Value* or *Percentage*.

In order to set the way in which the numeric values will appear in the report, follow the steps below:

1. Click the report component for which you want to define the display type of the numeric values.
2. Select the **Show As** option from the actions menu (Figure 66).
3. Define whether the values of the selected component should be displayed as a *Numeric Value* or *Percentage*.
4. If the **Percentage** data display type is selected, specify the category against which the percentage will be calculated.

Note: The data display type for the report components can also be defined from within the *Properties* window.

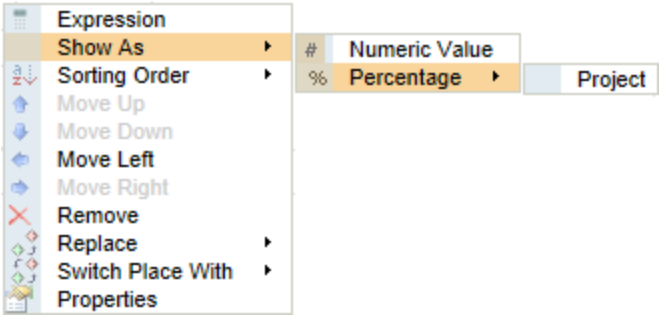


Figure 66: Defining the Data Display Type

10.6.4 Sorting Report Table Components

You may change the order in which the table components will appear in the final report. The report table components can be sorted either in an *Ascending (A-Z)* or a *Descending (Z-A)* order. In order to alphabetically sort the report table components, follow the steps below:

1. Click the component item for which the sorting order needs to be changed.
2. Select the **Sorting Order** option from the actions list (Figure 67).
3. Define whether the report item values should be sorted in the ascending or descending order. Please note that selecting the **None** option from the list removes the sorting criteria.

Note: The sorting order for the report components can also be defined from within the *Properties* window.

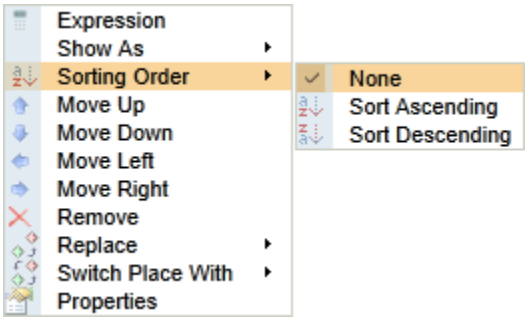


Figure 67: Defining the Sorting Order

10.6.5 Removing a Report Table Component

It is possible to remove a report table component from being included in the report, if this is necessary. In order to remove a report table component, follow the steps below:

1. Click the component item that needs to be removed.
2. Select the **Remove** option from the menu that appears. The selected grouping value will be removed.

10.6.6 Switching Report Table Components

The report table components may be switched between report grouping, rows and columns. If there are sub-columns selected, switching between table groupings / rows and columns is disabled. It is possible to switch between table groupings / rows and sub-columns.

In order to switch report table components, follow the steps below:

1. Click the component item that needs to be switched.
2. Select the **Switch Place with** option from the menu that appears (Figure 68).

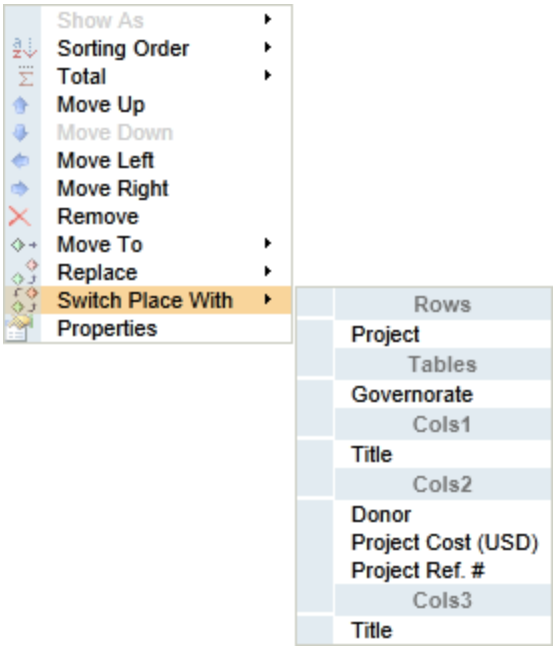


Figure 68: Switching Report Table Components

3. Define what component item the selected instance needs to switch place with. The selected component item will be removed from its current position and added as an item to the specified component. For instance, switching is selected between table grouping and row, the table grouping item will be removed from table grouping and added as the row item, while the row item will 'trade' places with the table grouping item.

10.6.7 Building Complex Expressions

IDMS is incorporated with a tool that allows building complex expressions based on mathematical equations. These expressions can then be used as column and sub-column items when drawing up a report.

In order to add an expression, follow the steps below:

1. Go to the **Report** module.
2. Click the **Add** button at the bottom of the *Expressions* section (Figure 69). The *Expressions* window will appear (Figure 70).

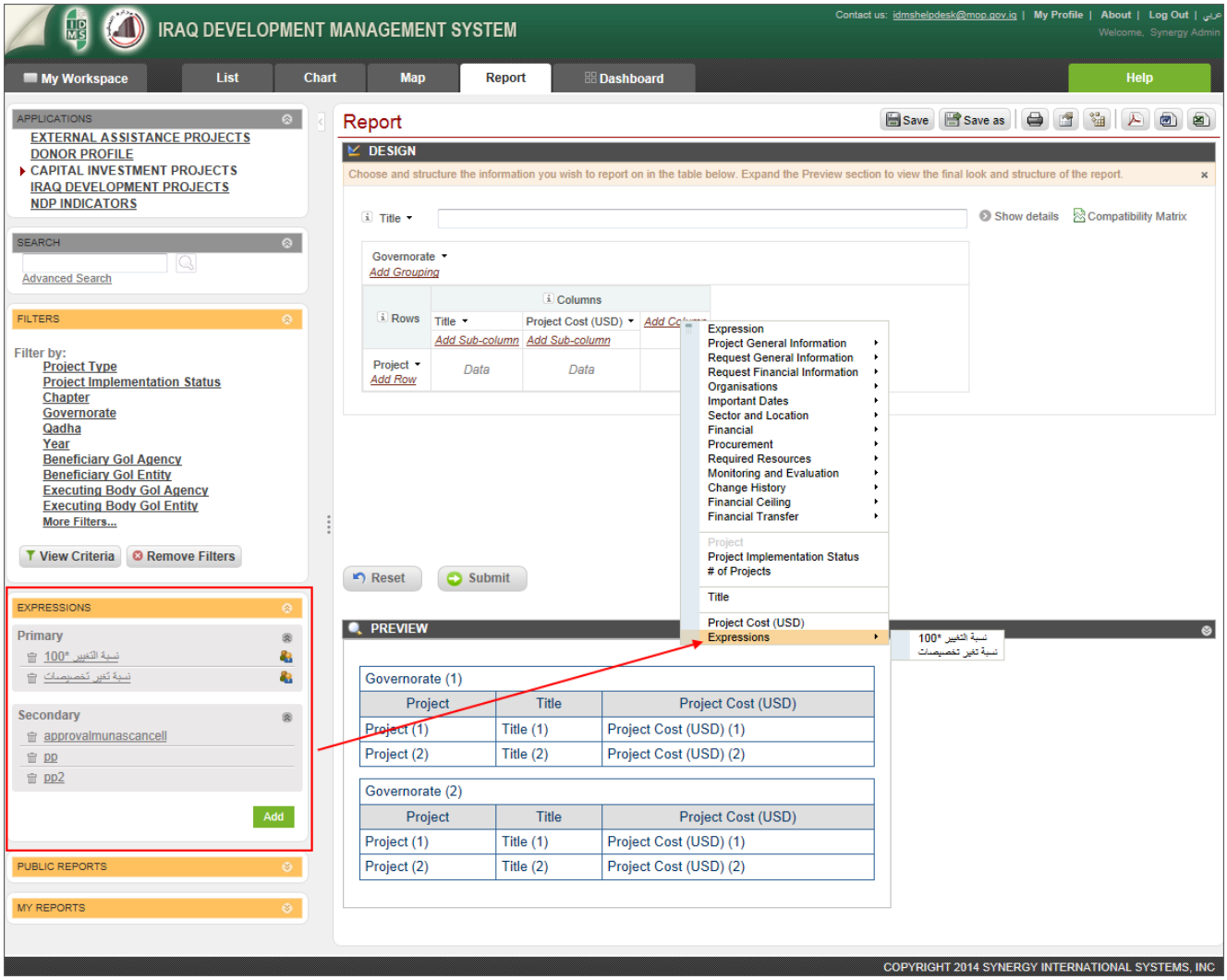


Figure 69: Expressions Section in the Report Module

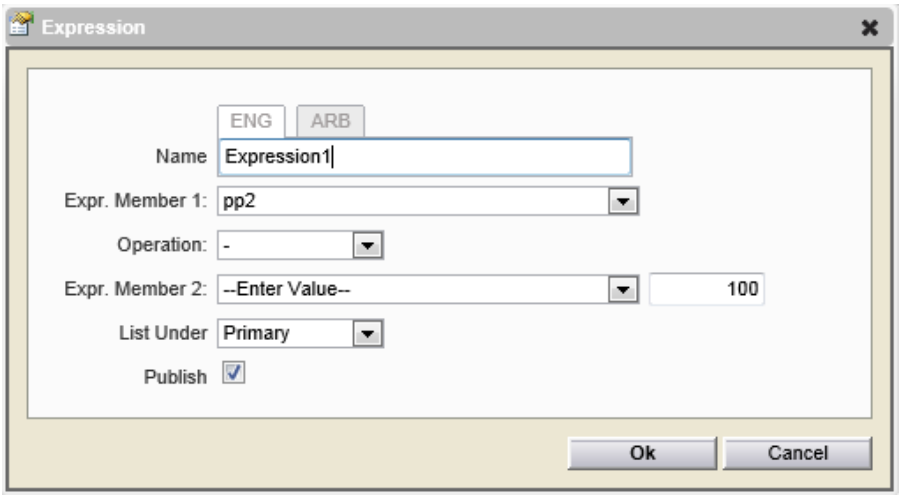


Figure 70: Adding an Expression

3. Enter the expression title in the English and Arabic languages.
4. Select the expression members and arithmetic operation from the respective drop-down lists (Figure 70).
5. Specify where to list the expression. The following options are available:
   - Primary
   - Secondary

   Note: *Secondary* expressions can be used as expression members.
6. Choose whether to publish the expression by selecting the respective checkbox.
7. Click the **Ok** button to save the expression. The newly added *Primary* expression will appear in the categories list (Figure 69).

10.7 Sample Report Formatting

If you have indicated:

- **Projects Yearly Allocation Changes** as the report title;
- **Year / Reallocation Funding Type / Project / (History) Status Changed On** as the report rows;
- **Modified Allocation By Year (IQD)** and **(History) Allocated (IQD)** as columns;
- Applied a filter to show only 2012 year projects with **REALLOCATION REQUESTED** request status;
- Assigned some value characteristics (e.g. font size, background color, etc.) (Figure 71):

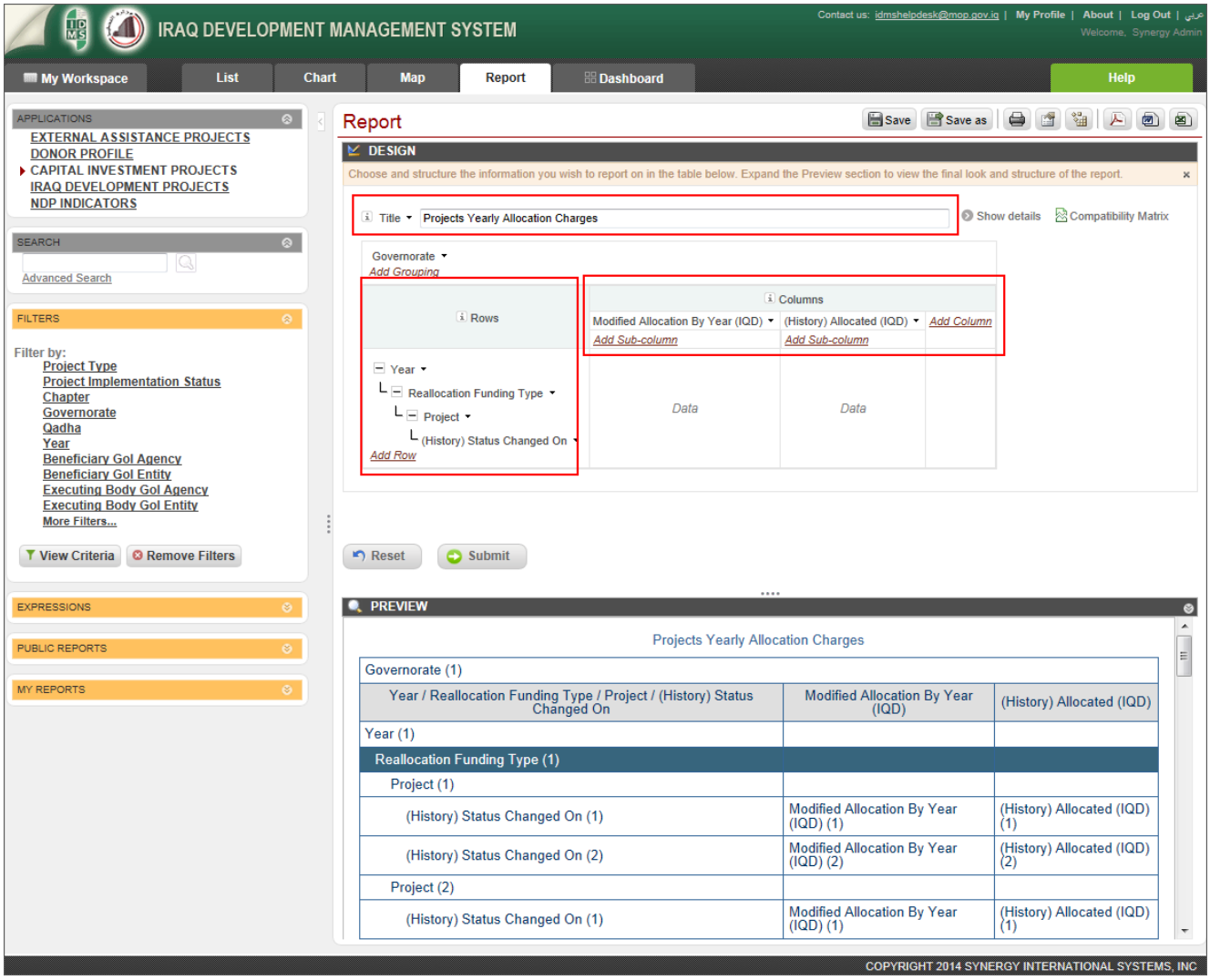
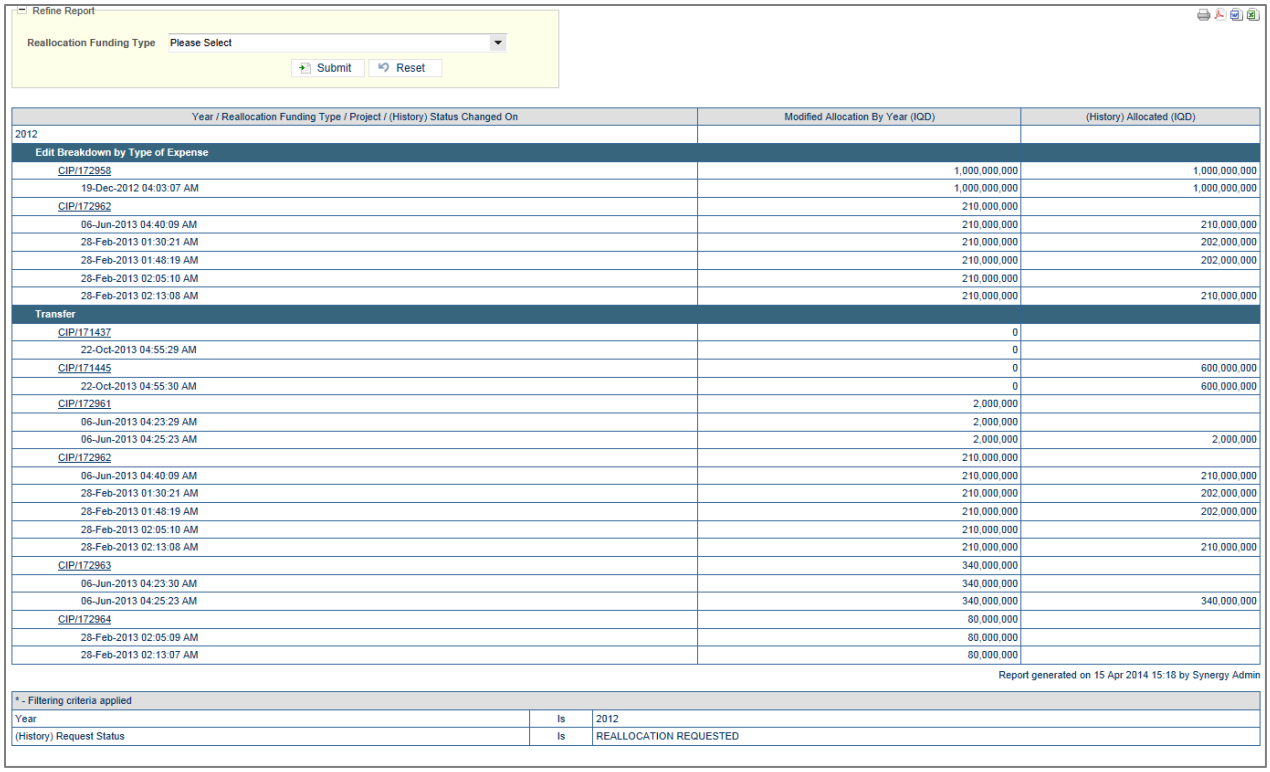


Figure 71: Creating and Formatting a Report

You will have the following result (Figure 72):



Refine Report

Reallocation Funding Type: Please Select

Submit Reset

Year / Reallocation Funding Type / Project / (History) Status Changed On	Modified Allocation By Year (IQD)	(History) Allocated (IQD)
2012		
Edit Breakdown by Type of Expense		
CIP/172958	1,000,000,000	1,000,000,000
19-Dec-2012 04:03:07 AM	1,000,000,000	1,000,000,000
CIP/172962	210,000,000	
06-Jun-2013 04:40:09 AM	210,000,000	210,000,000
28-Feb-2013 01:30:21 AM	210,000,000	202,000,000
28-Feb-2013 01:48:19 AM	210,000,000	202,000,000
28-Feb-2013 02:05:10 AM	210,000,000	
28-Feb-2013 02:13:08 AM	210,000,000	210,000,000
Transfer		
CIP/171437	0	
22-Oct-2013 04:55:29 AM	0	
CIP/171445	0	600,000,000
22-Oct-2013 04:55:30 AM	0	600,000,000
CIP/172961	2,000,000	
06-Jun-2013 04:23:29 AM	2,000,000	
06-Jun-2013 04:25:23 AM	2,000,000	2,000,000
CIP/172962	210,000,000	
06-Jun-2013 04:40:09 AM	210,000,000	210,000,000
28-Feb-2013 01:30:21 AM	210,000,000	202,000,000
28-Feb-2013 01:48:19 AM	210,000,000	202,000,000
28-Feb-2013 02:05:10 AM	210,000,000	
28-Feb-2013 02:13:08 AM	210,000,000	210,000,000
CIP/172963	340,000,000	
06-Jun-2013 04:23:30 AM	340,000,000	
06-Jun-2013 04:25:23 AM	340,000,000	340,000,000
CIP/172964	80,000,000	
28-Feb-2013 02:05:09 AM	80,000,000	
28-Feb-2013 02:13:07 AM	80,000,000	

Report generated on 15 Apr 2014 15:18 by Synergy Admin

* - Filtering criteria applied		
Year	Is	2012
(History) Request Status	Is	REALLOCATION REQUESTED

Figure 72: Sample Formatted Report

11. DASHBOARD MODULE

Reporting requirements have changed dramatically over the past few years. Nowadays, it is not enough to be able to produce a report to analyze data, but it is more essential to have a reporting tool that will allow for a visual display of the most important information consolidated and arranged on a single screen so that real-time data can be monitored at a glance.

As a comprehensive reporting tool, *IDMS* removes the limitations on report development giving the possibility to view various types of reports such as lists, maps, and charts displayed in a user-friendly environment on a dashboard. Unlike 'regular' reports, dashboards provide visual, at a glance insight into the data to be analyzed, thus giving the decision-makers the possibility to leverage information assets in real-time through visually rich, responsive and personalized business intelligence dashboards. This way, they will achieve better data interpretation and, as a result, more informed decision making.

11.1 Key Features

You can make use of the following key features of the *Dashboard* tool in *IDMS*:

- ✓ An intuitive drag-and-drop environment that turns adding reports to a dashboard into an easily manageable task.
- ✓ Fully resizable report windows.
- ✓ Better visualization of the information presented in graph reports.
- ✓ The ability to print reports for future reference.
- ✓ The ability to export reports on the dashboard in MS Word, MS Excel, and Adobe PDF formats.

11.2 Accessing the Dashboard Module

In order to access the *Dashboard* module of the system, you should click the **Dashboard** tab. This will navigate you to the *Dashboard* module. In this module, you can create dashboards, include reports under them, etc.

11.3 Main Screen and Its Components

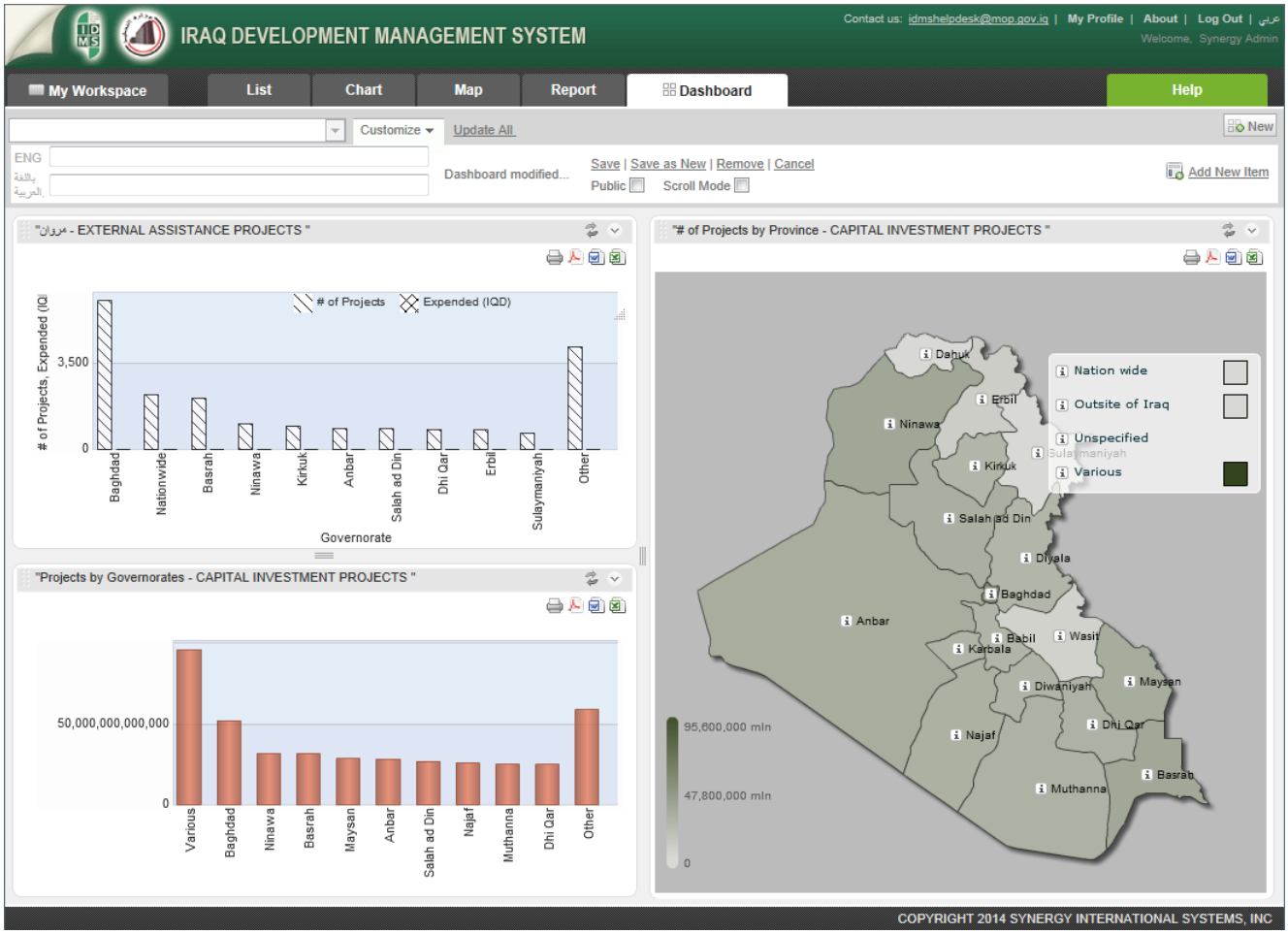


Figure 73: Dashboard Module

- **Dashboard Selector -** contains a list of pre-defined dashboards. By choosing a definite dashboard from this list, you can view the reports stored in the selected dashboard.

- **Customize -** allows performing the following operations:
  - ***Name* -** displays the dashboard name.
  - ***Save* -** saves a dashboard so that it can be shared with other users.
  - ***Save as New* -** saves a dashboard as a new one. This option is especially useful if you need to make modifications in a definite dashboard while keeping the source information intact. This way overwriting of the original dashboard is prevented.
  - ***Public* -** makes the dashboard available to other users as well if selected.
  - ***Scroll Mode*** - toggles the scrollbar thus allowing additional space for adding reports to the dashboard.
  - ***Remove* -** deletes a dashboard together with its contents.
  - ***Cancel* -** discards the modifications made to the dashboard currently displayed on the screen.

- ***Update all* -** loads the latest data from the database.

- ***New* -** creates a new dashboard.

- **Add New Item -** adds a new report under the definite dashboard from the list of all pre-defined reports previously created.

- **Dashboard Workspace -** the main screen of the Dashboard module where the content of a definite dashboard is viewed.

11.4 Dashboard Management

11.4.1 Create a New Dashboard

In order to create a new dashboard, follow the steps below:

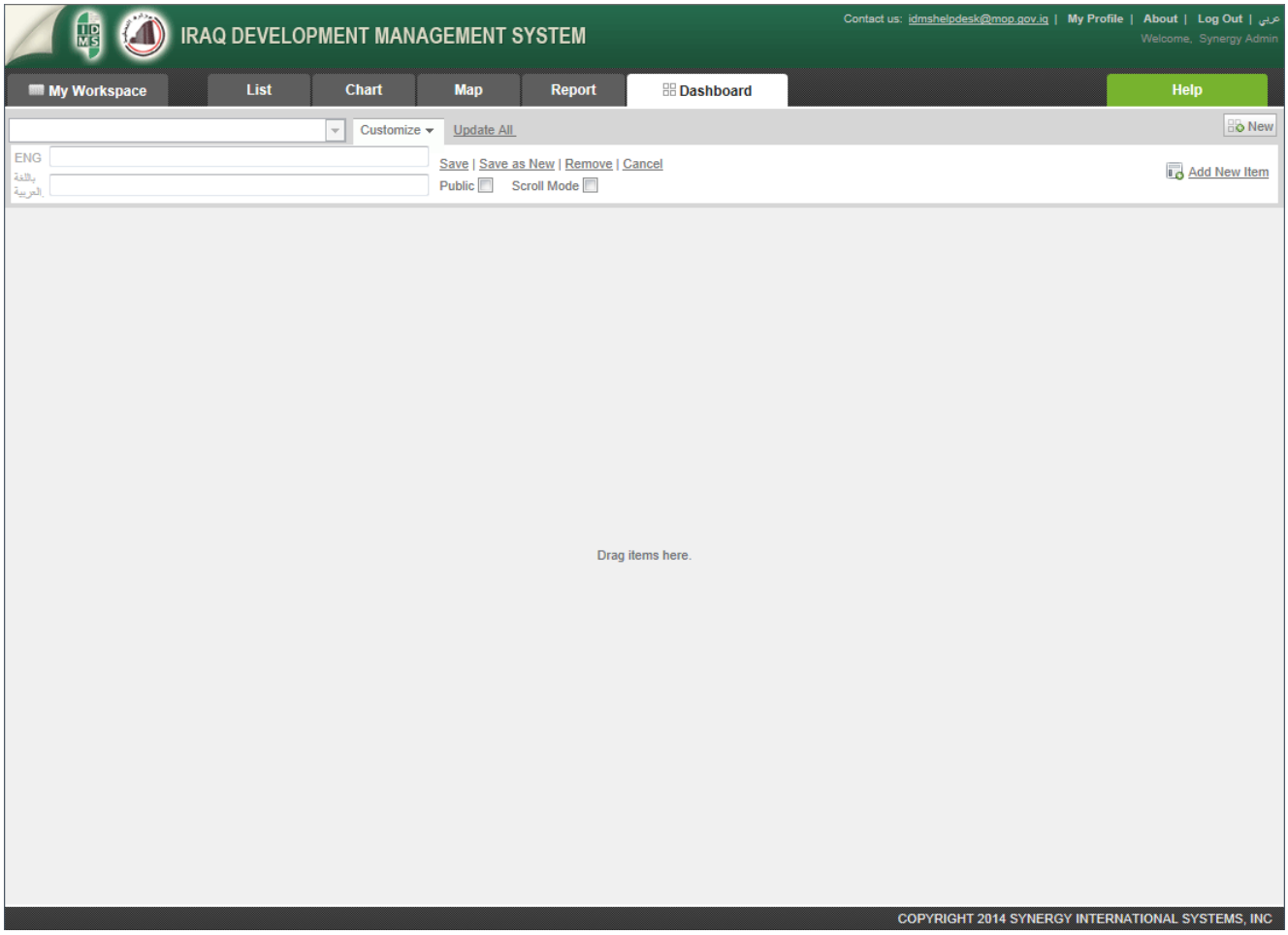


Figure 74: Adding a New Dashboard

1. Click the **New** button at the upper right corner of the screen. New field appears in the left part of the screen to give a name other than the default one to the dashboard and to save it. Also, the list of all existing pre-defined reports is used to add new items to the dashboard (Figure 74).
2. Give the desired name to the dashboard in the English and Arabic languages.
3. Add reports to the dashboard, see Add an Item to a Dashboard.
4. Save it.

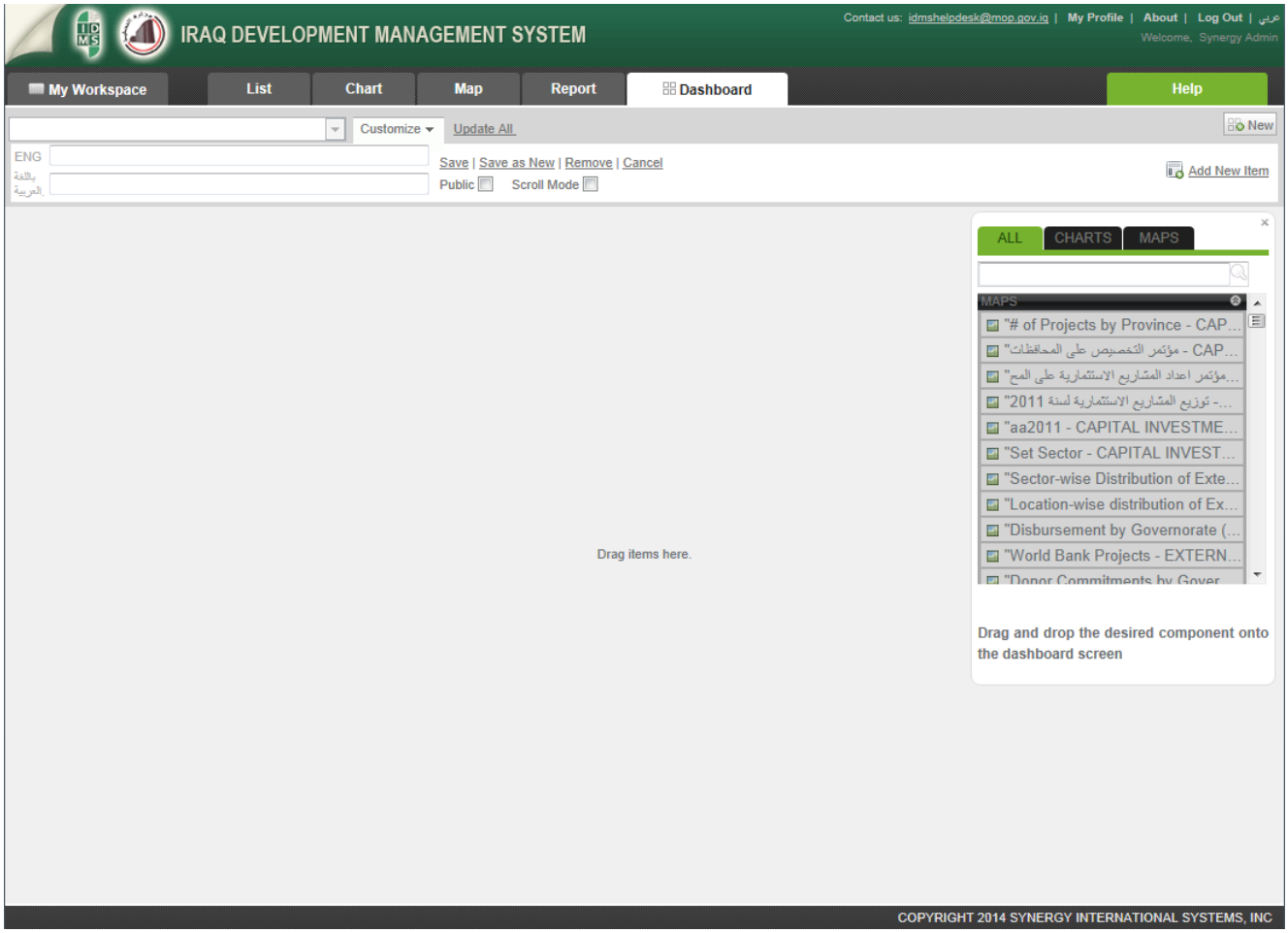


Figure 75: List of Pre-defined Reports

11.4.2 Add an Item to a Dashboard

In order to add a report to a dashboard, follow the steps described below:

1. Click the **Add New Item** link. The list of all reports previously saved reports will appear (Figure 75).
2. Select a report to add to a dashboard and drag-and-drop it onto the main screen.
3. If you want to add another report to the dashboard, select it in the list, drag it onto the main screen and hold the left mouse button until a green rectangle appears on the screen indicating an area where the new report can be placed. Keep the mouse button pressed until the green rectangle turns blue and release the mouse button (Figure 76).
4. You may add multiple reports to the dashboard.

Note: The reports can be arranged either in vertical or in horizontal order. Once the place for the report is selected, it cannot be changed.

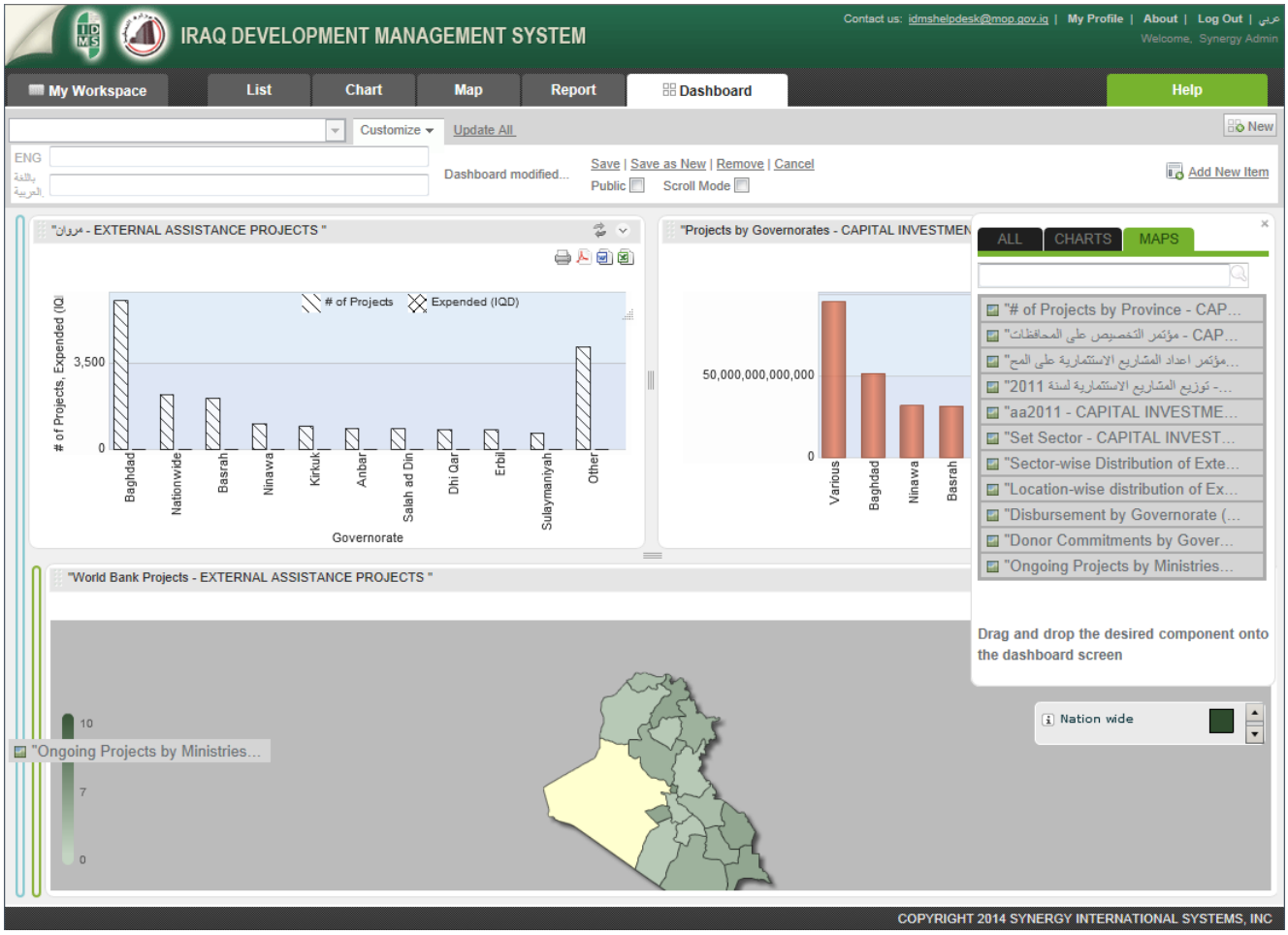


Figure 76: Adding a New Report

11.4.3 Customize a Dashboard

In the *Dashboard module*, you can customize any dashboard created, i.e. rename the dashboard, save the changes made to it, save a copy of the dashboard, delete a dashboard, and/or discard the changes made. For details, see below.

In order to customize a dashboard, follow the steps below:

1. Click the **Customize** button. A new section will appear displaying all customizable options in the *Dashboard* module (Figure 77).
2. Take the necessary action.
3. Save the changes.

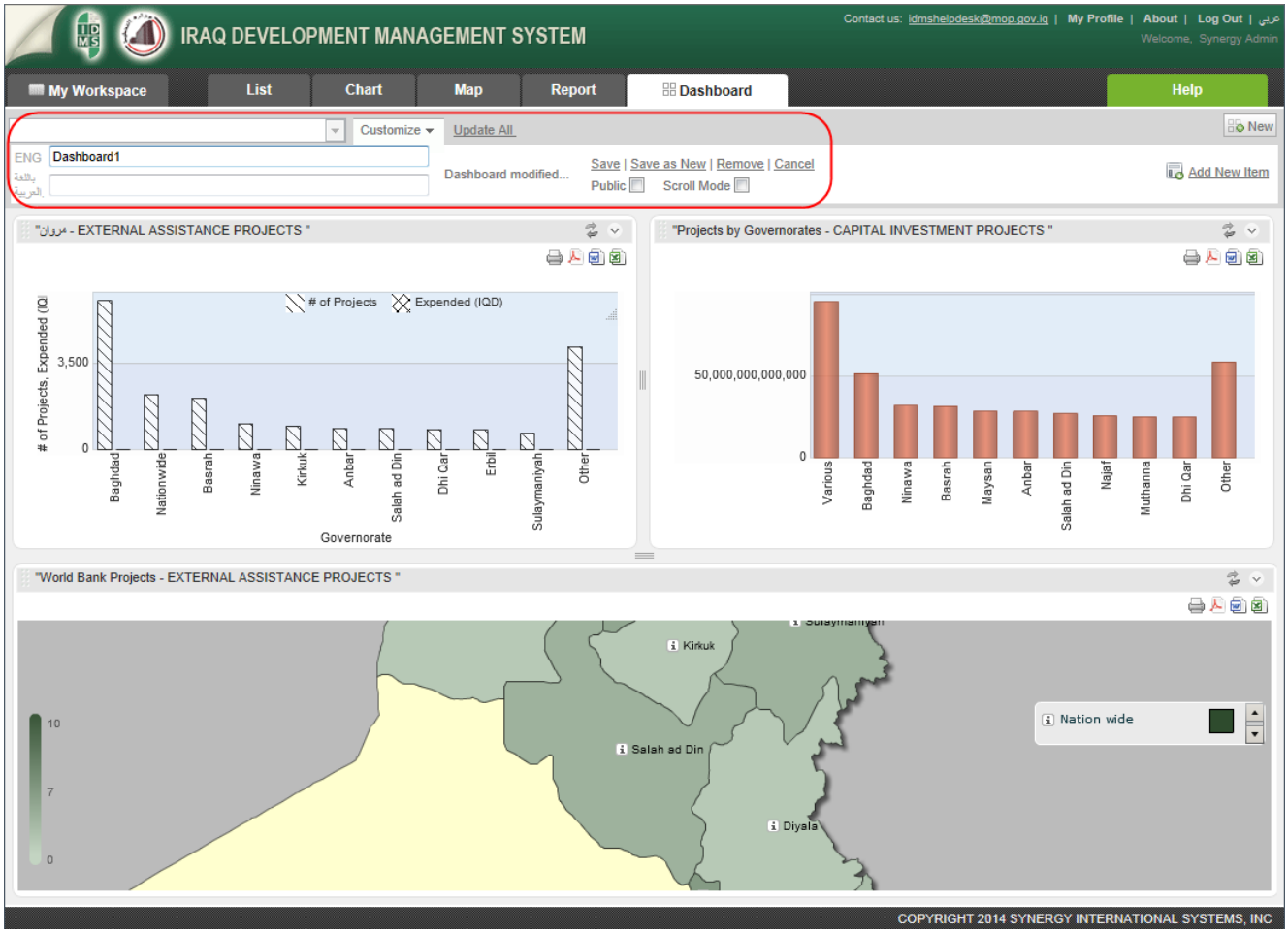


Figure 77: Customizing a Dashboard

11.4.4 Save a Dashboard

After the new dashboard has been created and items added to it, it is necessary to save it to be able to view it later on. It should be mentioned that there are two options for saving dashboards:

- **Save:** saves all modifications made to the dashboard.
- **Save as New**: saves a copy of a dashboard under a new name.

In order to save a dashboard / a copy of a dashboard, follow the steps below:

1. Select the respective **Save** or **Save as New** option.
2. Click **OK** in the message window indicating the dashboard / the changes to it have been saved successfully.

11.4.5 Delete a Dashboard

In order to delete a dashboard, follow the steps below:

1. Select the dashboard that you want to delete. Its contents will be displayed on the main screen.
2. Click the **Remove** link. The selected dashboard will be deleted.

11.4.6 Discard the Changes

In order to discard the changes made to the dashboard currently displayed on the screen, follow the steps below:

1. Click the **Cancel** link.
2. Confirm that you want to discard all changes made to the dashboard by clicking **OK** in the warning message window that appears.

11.4.7 Update Data

For decision makers, it is very important to have access to the latest data available. This is why the Dashboard module allows you to update all reports included in various dashboards. In order to load the latest data from the database, select the **Update All** option.

If you want to update the data in an individual report, click **Refresh** button in the top toolbar of the report screen. The latest data for the selected report will be loaded from the database.

12. DETAILS SECTION

IDMS has a built-in *Details* section, where detailed project information can be viewed, e.g. project financial information, the sector(s) of economy it supports, the project location, etc.

The *Details* section can be accessed from the *List*, *Chart*, *Map, Report* and *My Workspace* modules. In the *Details* section, the user can view detailed project information, browse among other projects listed under the same parent item, print project details, etc. Moreover, the user is able to modify an existing one. **Please note** that for modifying an existing project, special user permissions are required.

12.1 Accessing the Details Section

In order to access the *Details* section, follow the steps below:

1. Access the *Details* section by clicking on the one of the following:
   - In the *My Workspace* module: Click the respective project. You will be directed to the **Details** section (Figure 78).
   - In the *List* module: Click the project for the details to be displayed. This will open the *Details* section of the application where more detailed information about the project will be displayed.
     Note: Depending on the list representation settings, additional expanding the list items may be required to reach the project.
   - In the *Chart* module: Click the chart for the details to be displayed (e.g., click a relevant bar to see what it consists of). This will open the *Details* section of the application where all items matching the selection will be listed. The first item in the list will be displayed in an expanded mode.
   - In the *Map* module: Point the mouse cursor on the object on the map. The project information window will appear. In order to access the project details section select the **View Projects** link. This will open the *Details* section. The first item in the list will be displayed in an expanded mode.
     Note: You can also choose to view the detailed information on all the projects that are in progress in the given territorial unit by pointing the mouse cursor on the button.
   - In the *Report* module: Create a report indicating 'Project' as a value for the report row and click the **Submit** button. For more details on how to create and generate reports, please see Creating a Report. In the report generated, click the project name.
2. Take the necessary actions (review the provided information, update and improve as needed). You may also want to print the project details, see Printing the Project Details for details. The **Close** button is used to return to the main screen.

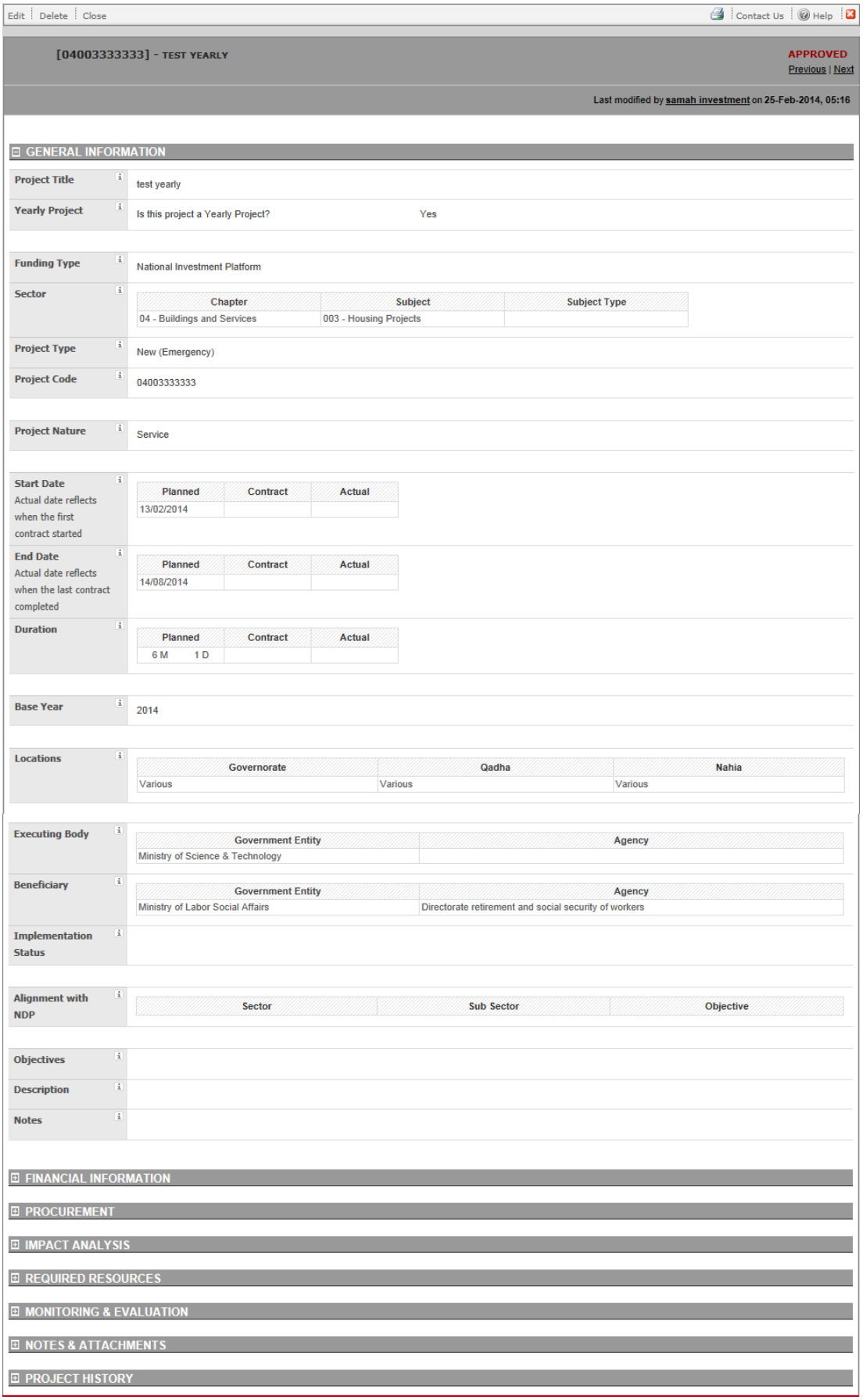


Figure 78: Details Section

12.2 Browsing among Projects

In the *Details* section, you can browse among the projects. To browse projects, use correspondingly **Previous** or **Next** buttons in the top of the *Details* window (Figure 78).

Note: In the *Chart* and *Map* modules, you can also scroll down to the bottom of the page, find the appropriate project in the list presented and click it for the details to be displayed.

12.3 Printing the Project Details

In the *Details* section, you can print out the details of the selected project. In order to print out the selected project details, follow the steps below:

1. Click the **(Print)** button in the top toolbar. A window with printer settings appears.
2. Choose the printer settings as needed and press **Print**.

12.4 Editing an Existing Project

In the *Details* section, you may also edit those existing projects that have been either created by yourself or you have permissions to manage.

In order to edit existing projects, follow the steps below:

1. Click the **Edit** button at the top of the *Details* window. The data input window appears which is described in the corresponding Application User Manual, see REFERENCES.
2. Make the appropriate changes in the input window and save.

13. CUSTOMIZED REPORTING

IDMS is used to customize the already-created reports in the *List*, *Chart*, *Map*, and *Report* modules, i.e. to define the way the numeric values can be displayed, their format, the number of the items to be displayed, etc. You may re-organise the reports in the desired way: include it into a group of reports or create a new report group for it, rename the report, etc. *IDMS* also enables you to export the reports to the desired format (Word, Excel, etc.) or print them out.

13.1 Setting Report Options

In the *List* and *Report* modules, you can set the report options, i.e. define whether the numeric values should be displayed in thousands, millions, etc.

In order to set the report options, follow the steps below:

1. Click the **(Set Options)** button in the top toolbars. An *Options* window (Figure 79) will appear.
2. Specify whether the row serial number should be displayed in the first column of the generated report by selecting the appropriate value from the respective drop-down list.
   Note: This option is available in the *Report* module only.
3. Define the format in which the numeric values should be displayed, i.e. whether the original values should be displayed or they should be shown in thousands, millions, etc. This prevents large numeric values represented by many zeros from taking a lot of space in the report.

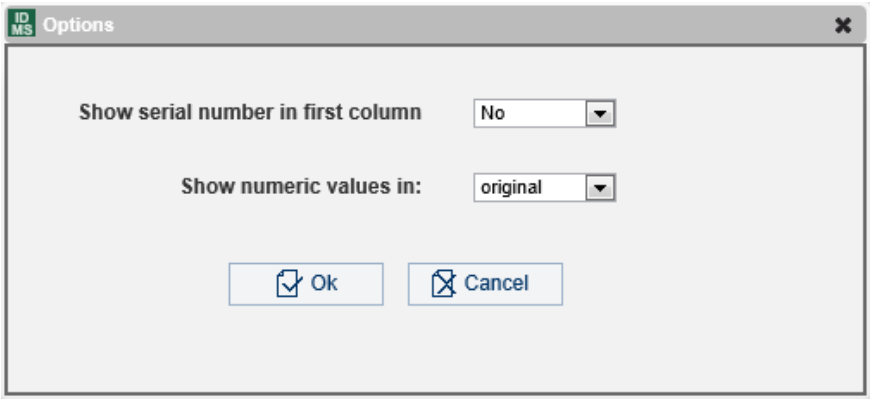


Figure 79: Setting the Report Options

4. After finishing, click the **OK** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

13.2 Saving Reports

After creating reports of different types, you can memorize them as pre-defined reports and include them either in the *Public Reports* group and make them available for all users who access application or in the *My Reports* group available to you only.

There are two ways of saving a report in the *IDMS* application. You can save a newly-created report, or save a copy of an existing report with a different name, in a different location, or with a different content.

13.2.1 How to Save New Reports

From the *List*, *Report, Chart*, and *Map* modules, you can design an appropriate report and save it. In order to save the report created, follow the steps below:

1. Click the Save button on the top right side of the screen. A *Memorize Report* window (Figure 80) will appear.
2. Define the report name in the *Memorized Name* field both in English and Arabic.

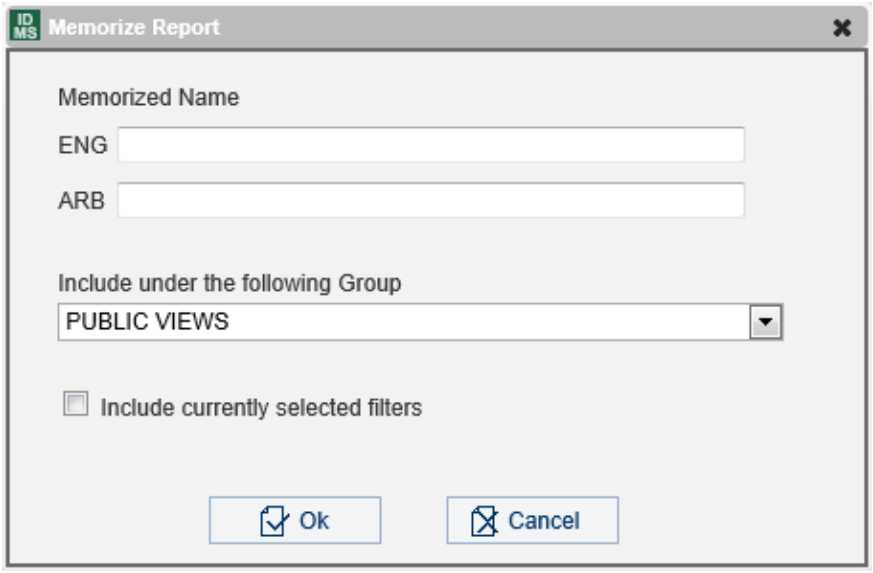


Figure 80: Memorizing a Report

3. Specify the group the report will be included in by selecting the appropriate value from the **Include under the Following Group** combo box.
4. Check the **Include currently selected filters** checkbox to save filtering defined along with the report.
5. Click the **OK** button to save the report for future reference or click **Cancel** to discard the changes made.

13.2.2 How to Save a Copy of the Report

In the *IDMS* application, you can save a copy of an existing report. The copy of the report can be saved in a different location, with a different name or edited content.

In order to save a copy of a report, follow the steps below:

1. Click the Save as button on the top right side of the screen. A *Memorize Report* window (Figure 80) will appear.
2. Save the report by the steps described in the section above.

13.3 Re-organising Reports

You can organise the reports in the desired way, i.e. rename the reports, create groups to include reports under, etc.

From the *List*, *Chart, Map*, and *Report* modules, you can design appropriate reports and organise them in the preferred way. In order to organise the reports, click the respective **(Organise Views / Charts / Maps / Reports)** button at the top right side of the Screen. An *Organise Reports* window (Figure 81) will appear. You may perform the following actions:

- Deleting Reports or Report Groups
- Adding a Sub-group
- Re-ordering Reports and Groups
- Setting a Report as Default
- Setting a Report as Default for Public Users

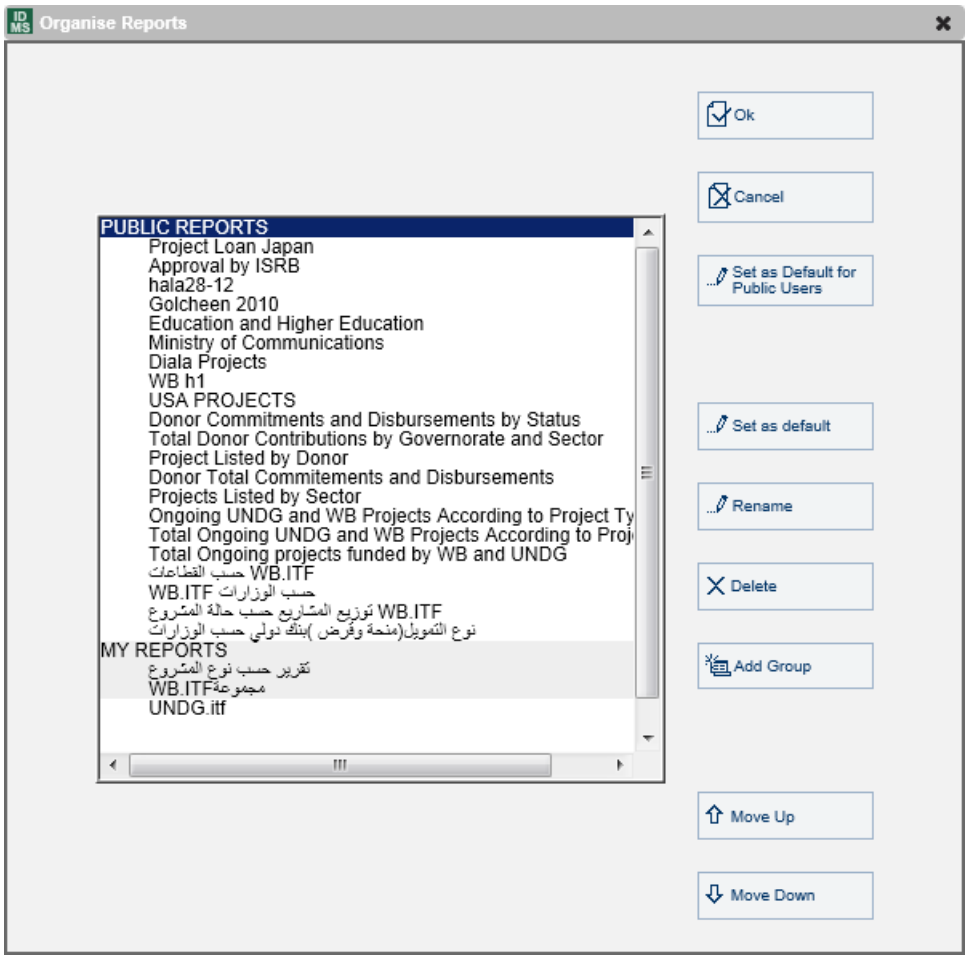


Figure 81: Organising the Reports

13.3.1 Renaming Reports and Report Groups

In order to rename a report/report group, follow the steps below:

1. Highlight the report / report group to be renamed.

2. Click the **Rename** button.
3. Fill in the desired name for the report / report group.
4. Click the **Enter** keyboard button to confirm renaming.

Note: *Public Reports* and *My Reports* groups cannot be renamed.

13.3.2 Deleting Reports or Report Groups

In order to delete a report/report group, follow the steps below:

1. Highlight the report / report group to be deleted.
2. Click the **Delete** button.
3. Click the **OK** button to confirm deletion.

Note: *Public Reports a*nd *My Reports* groups cannot be deleted.

13.3.3 Adding a Sub-group

In order to add a sub-group, follow the steps below:

1. Click the **Add Group** button.
2. Fill in the desired name for the sub-group.
3. Click the **Enter** keyboard button to confirm adding.

13.3.4 Re-ordering Reports and Groups

In order to re-order reports/report groups, follow the steps below:

1. Highlight the report / report group the sorting order of which needs to be changed.
2. Click the **Move Up / Move Down** button.

13.3.5 Setting a Report as Default

In order to set a report as default, follow the steps below:

1. Highlight the report to be displayed in the respective module when you access it.
2. Click the **Set as Default** button. The selected report will be marked with *(default for me)* option.

Note: This option is available only in the *Chart*, *Map*, and *Report* modules.

13.3.6 Setting a Report as Default for Public Users

In order to set a report as default for public users, follow the steps below:

1. Highlight the report to be displayed in the respective module when a public user accesses it.
2. Click the **Set as Default for Public Users** button (Figure 80). The selected report will be marked with *(default for public users)* option.

Note: This option is available only in the *Chart*, *Map*, and *Report* modules.

13.4 Viewing Pre-defined Reports

In the *List, Chart*, *Map*, and *Report* modules, you can view the pre-defined reports stored under **Public Views/Charts/Maps/Reports** or **My Views/Charts/Maps/Reports** section (see *Main Menu Bar* description in IDMS ANALYTICS STRUCTURE) for data analysis and comparison. For this purpose, select the report to display and click one of the following **Generate Report** buttons to the left of the report name:

- - in the *List* module;
- - in the *Chart* module;
- - in the *Map* module;
- - in the *Report* module.

The selected report will open in the application window (*List, Chart, and Map* modules) or a new window (*Report* module). The same results can be achieved if you click the report name.

13.5 Editing Pre-defined Reports

To save you the time and the effort of structuring a report from the scratch when it is necessary to introduce some modifications in any of the pre-defined reports stored under **Public Reports** or **My Reports**, the *Edit* option has been designed in the *Report* module.

In order to edit reports, click the **(Edit)** button to the left of the report to edit. The selected report structure will be loaded in the application window giving you the possibility of formatting and styling it in the desired way. For more details on how to apply formatting to the reports, see Customizing Reports.

The pre-defined *List* and *Chart* reports stored in **Public Views/Charts** or **My Views/Charts** can also be edited after you have selected to view them (see Viewing Pre-defined Reports). Once the selected report is loaded in the application window, make the appropriate changes and save them. If you wish to keep the modifications, do not forget to save the modified report, see Saving Reports.

13.6 Exporting Reports

From the *Chart, Map,* and *Report* modules, you can design appropriate reports and export them in the PDF, MS Word and MS Excel formats.

In order to export the reports in the PDF, MS Word and MS Excel formats, follow the steps below:

1. Click the respective **(Export in PDF format)** / **(Export in MS Word format)** / **(Export in MS Excel format)** button. A separate window will open.
2. Make changes, if necessary.

13.7 Printing Reports

From the *Chart, Map,* and *Report* modules, you can design appropriate reports and print them out. In order to print out the selected report, follow the steps below:

1. Click the **(Print)** button on the top toolbar in the right side of the screen. A separate window will open.
2. Select the **Print** option.

14. FILTERING

The system allows for data filtration. Filtering is used to narrow down the information displayed in the reports. The filtration works in the Step-by-Step technology, which enables to implement new filtering over the results of the previous one. This option reduces the size of reports and makes them easier to read. Filters can be added to new or existing reports. Defined filtering is applicable for list, reports, charts, and maps.

The list of the most frequently used filter categories is displayed under the *Filter By:* section. The list of all available filter categories is displayed when the *More Filters* section is accessed.

14.1 Creating Filtering Criteria

Follow the instructions below to create filtering criteria:

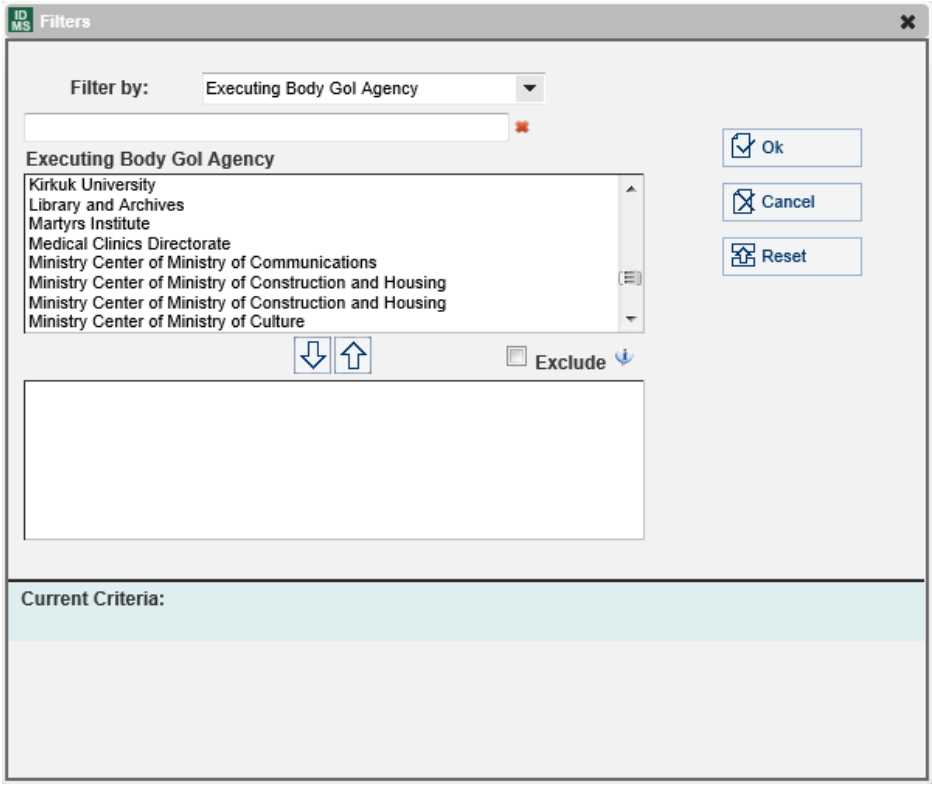


Figure 82: Filters

1. Click the hyperlink under the *Filtering* section that represents the *Category* according to which the filtering will be carried out. A *Filters* window (Figure 82) will appear having the *Category Item* pull down menu set to the selected *Category*. The first text area holds a list of all the available *Category* items that the report could display, whereas the second text area holds a sub-set list of the first one. You can only edit the sub-set list in the second text area. At the end of the filtering, if the sub-set list is empty, all the *Category* items will be included in the report. If, however, the sub-set is non-empty, only the items in the sub-set list will be included in the report. At the bottom of the pop-up window the selection criteria from all categories are presented. This view is also available from the main screen under the **View Criteria** hyperlink.

2. Select a *Category* item from the list in the first text area.
   Note: In case the category items list is long and hard to browse in, you can search for a specific item(s) by providing search criteria in the respective field. The search result will return all possible matches (Figure 83).
3. Click the downward-pointing arrow button to add the item selected to the list in the second text area (Figure 84).
4. Repeat steps 2 and 3 to add more than one category item.
   Note: If a *Category* item needs to be removed from the second text area, select it from the list in the second text area and click the upward-pointing arrow button.
5. Click the **OK** button to apply the filtering to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List, Chart, or Map). The system will regenerate and download, to the client's side, an updated report that applies the updated filtering criteria.

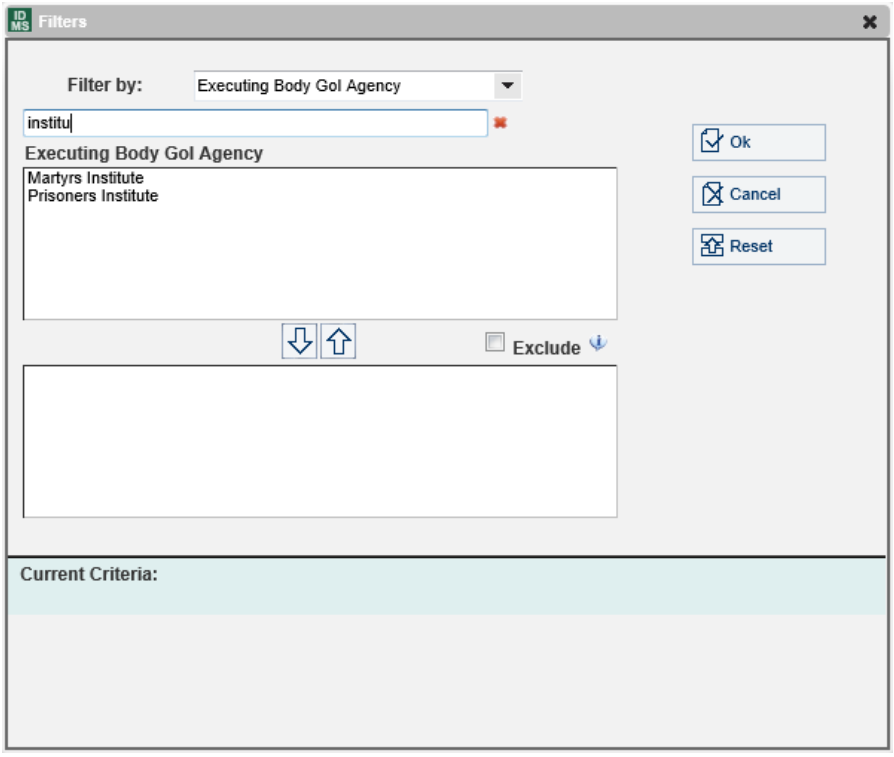


Figure 83: Searching for a Category Item

Note: It is possible to exclude a *Category* item(s) from being included into the filtering criteria to be created. Select the *Exclude* checkbox in this case. All the *Category* items that appear in the second text area will be excluded from the filtering criteria to be created.

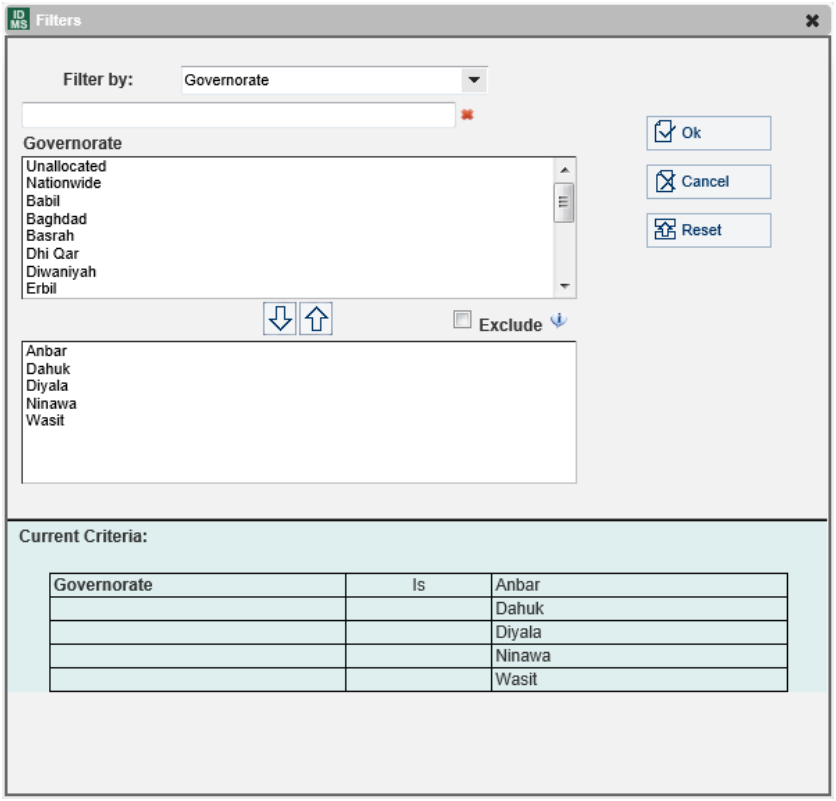


Figure 84: Creating Filtering Criteria

14.2 Sample Filtering Criteria

If the following was selected for the initial view (Figure 85), and you have indicated:

- **Governorate** as a filtering category; and,
- **Diwaniyah**, **Karbala**, and **Maysan** as category items (Figure 86).

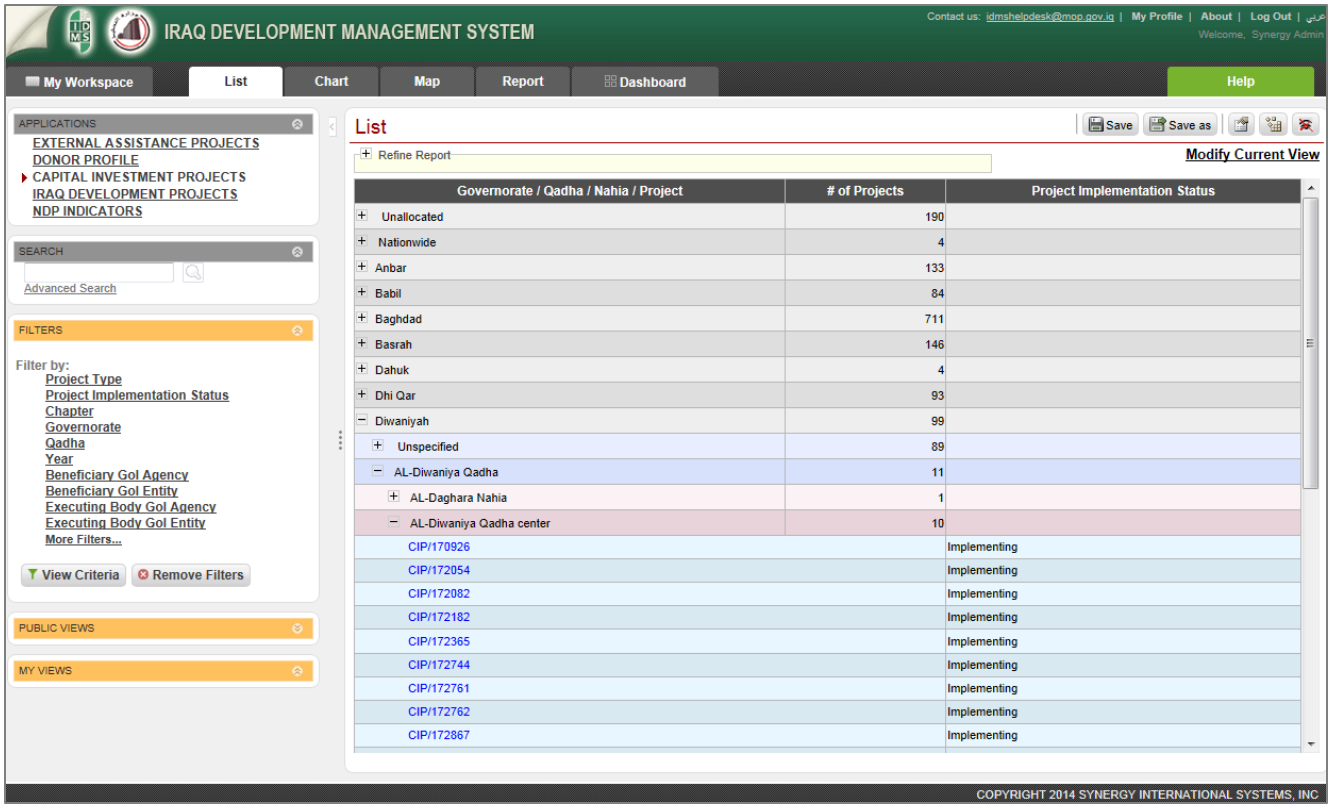


Figure 85: Initial View

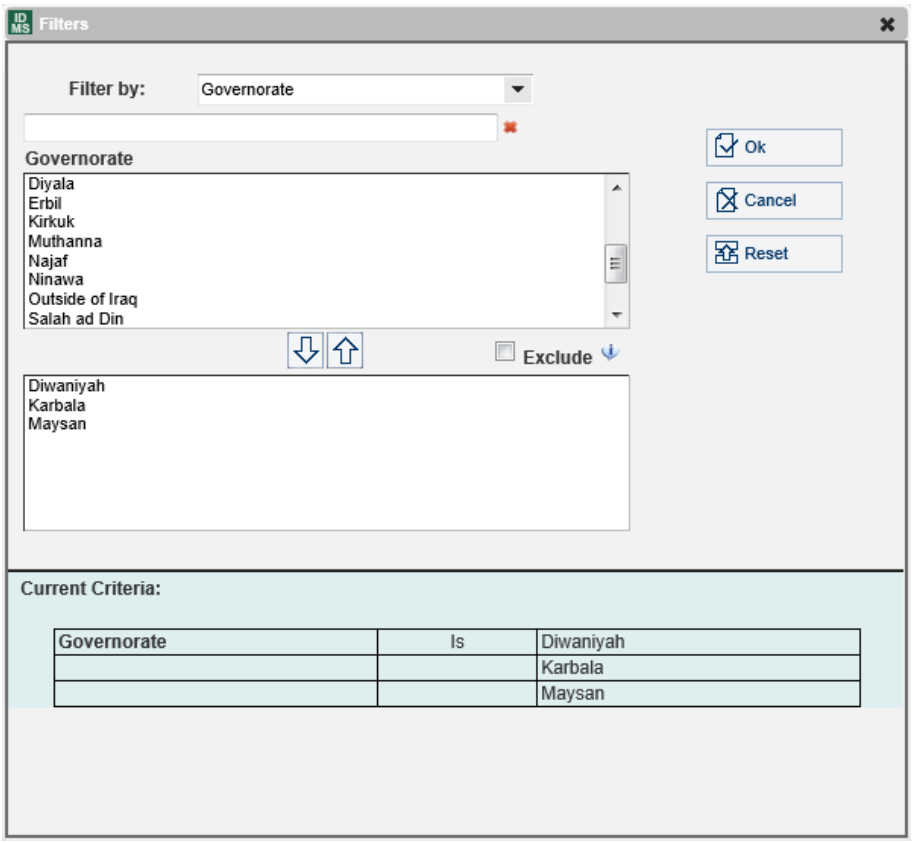


Figure 86: Sample Filtering Criteria

The following view will appear (Figure 87):

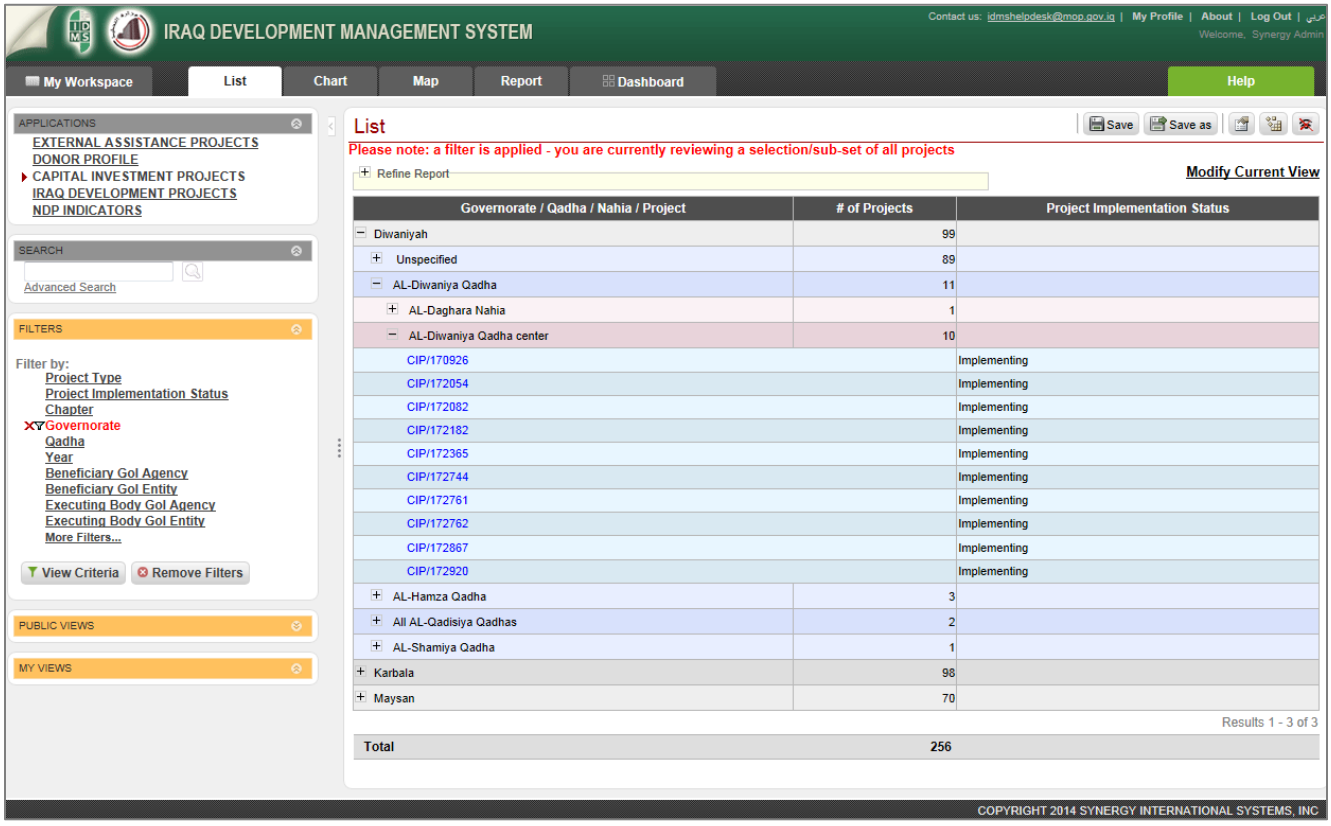


Figure 87: Filtered List

15. SEARCH

IDMS is equipped with a comprehensive search mechanism, which allows searching for any relevant information.

15.1 Simple Search

The simple search interface is available to find any relevant information quickly and easily within the integrated *IDMS* content. Simple search implies that you can type search operators directly into the search box.

15.2 Advanced Search

In addition to providing easy access to the content, the *IDMS* application has a number of specific features that is used to find exactly what is looked for. One of these features is advanced search that allows setting different complex conditions using the *Advanced Search* form. It gives several additional fields which may be used to qualify searches by such criteria as district, sub-sector, project title, etc.

Follow the instructions below to create search criteria:

1. Click the **Advanced Search** link under the *Filters* section. You will then be redirected to the *Filters* section (Figure 88).

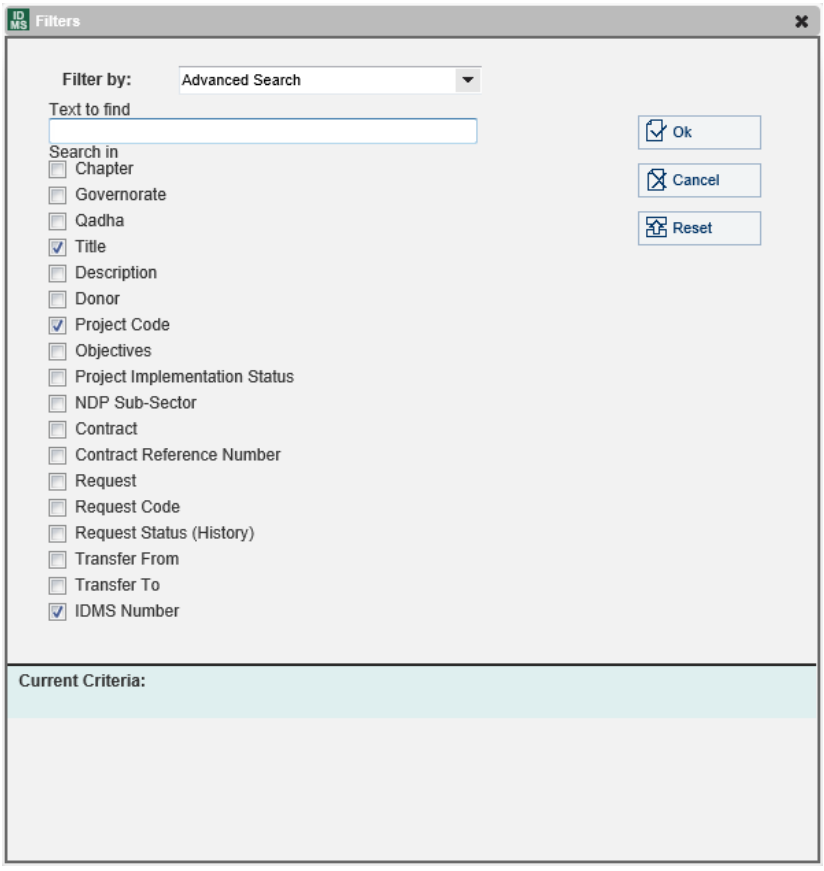


Figure 88: Creating a Search Criteria

2. Define the text to search for in the appropriate field.
3. Specify the fields to look in by selecting the appropriate checkbox(es).
4. Click the **OK** button to apply the search criteria to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List, Chart, or Map).

Note: The simple search (searching on all fields) is also available above the *Filters* section.

15.3 Sample Search Criteria

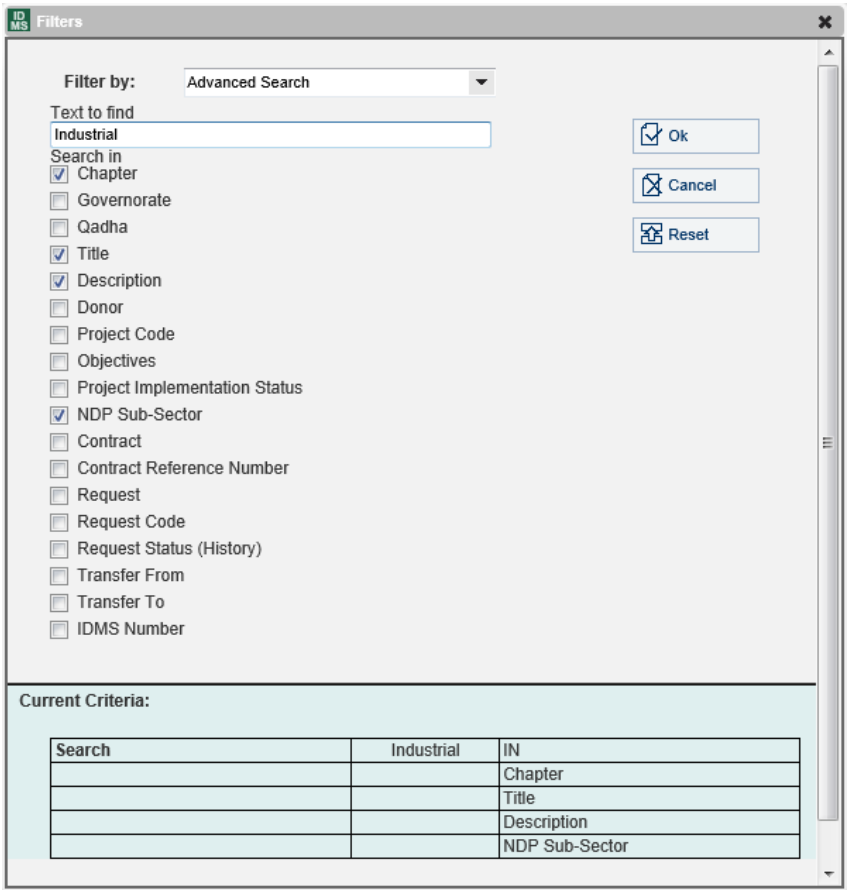


Figure 89: Defining Search Criteria

If you have selected to look for **Industrial** among project chapters, titles, descriptions and NDP sub-sectors (Figure 89), the following search result (Figure 90) will appear.

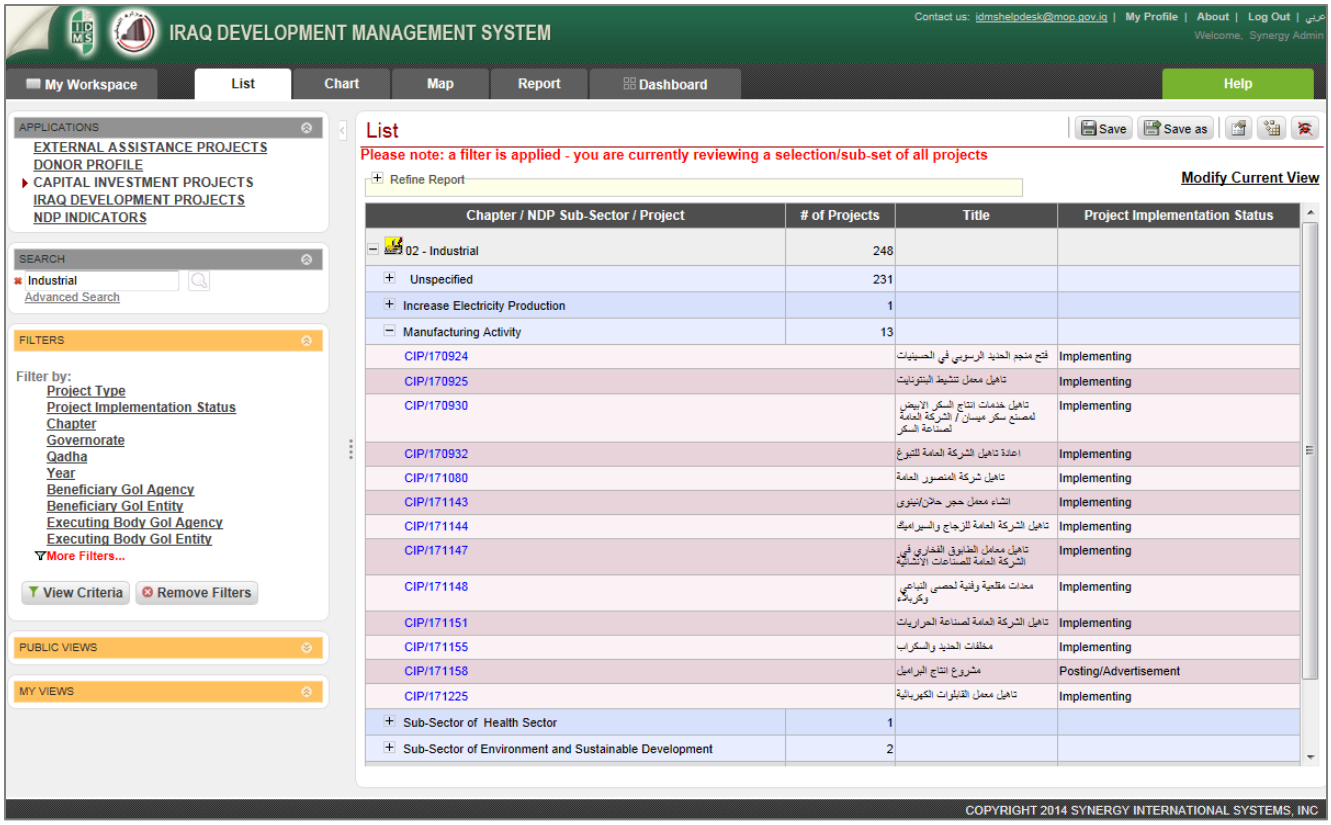


Figure 90: Search Results

16. LOGGING OUT

Once you have finished using *IDMS*, it is necessary to terminate the session and log off. In order to log off from the system, press the **Log Out** button in the upper right corner of the system window.

17. REFERENCES

Please refer to the following IDMS related documents:

- IDMS External Assistance Projects Application User Manual
- IDMS Capital Investments Projects Application User Manual
- IDMS Donor Profile Application User Manual
- IDMS NDP Indicators Application User Manual
- IDMS Administration Center User Manual